An Integrated Financial Solutions Firm

We work with business owners to turn complex ideas into simple, customized financial advice.

Net Worth Advice

We deliver a full spectrum of financial planning, asset management and tax services to align assets to goals with tax efficiency. By focusing on net worth, conversations are more meaningful, and solutions are more precise.

Read more

Investments

Investing can feel overwhelming—which stocks to buy, when to sell, different types of investments (e.g. mutual funds, individual stocks, ETF's), and the infinite number of market forecasts to consider. Instead of relying on opinions, we look to data to guide our investment decisions.

Read more

Tax Services

An ounce of prevention is worth a pound of cure" is especially true for tax planning and preparation. We work with business owners to efficiently plan and prepare your all tax needs, both business and personal.

Read more

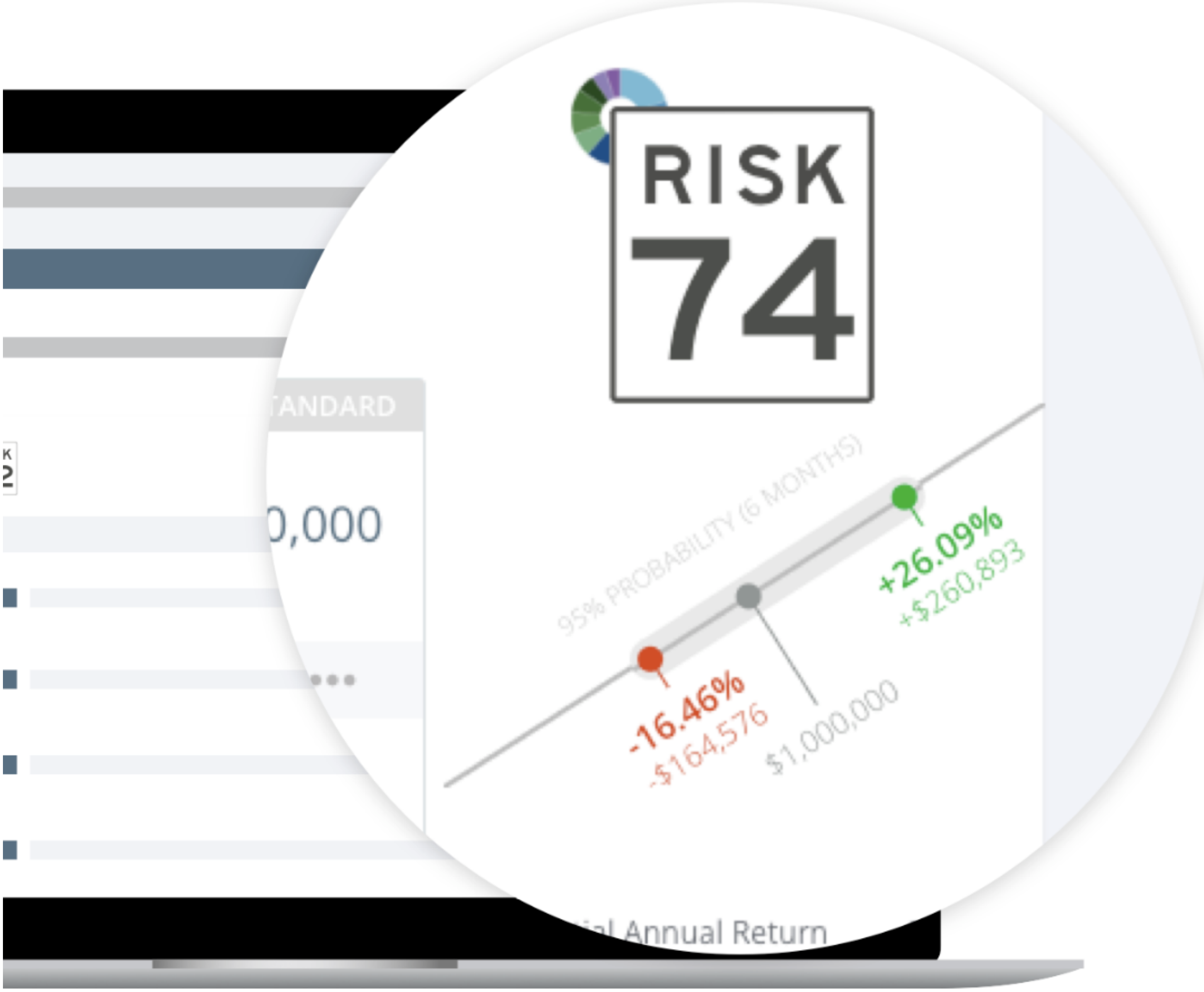
We Think Differently

Our firm delivers a unique and integrated suite of services including financial planning, asset management and tax services. Our clients benefit from working with a team of highly accredited advisors in the financial services industry – CPA, CFP, CFA.

We believe that successful families benefit from a team approach where advisors complement each other's skills sets and have areas of expertise and focus. Because of this team approach with highly accredited experts, we are uniquely positioned to advise, coordinate and execute plans for our client's entire net worth.

We help our clients answer questions and make decisions on a range of issues related to real estate, privately held business interests, retirement savings and tax implications.

Read more

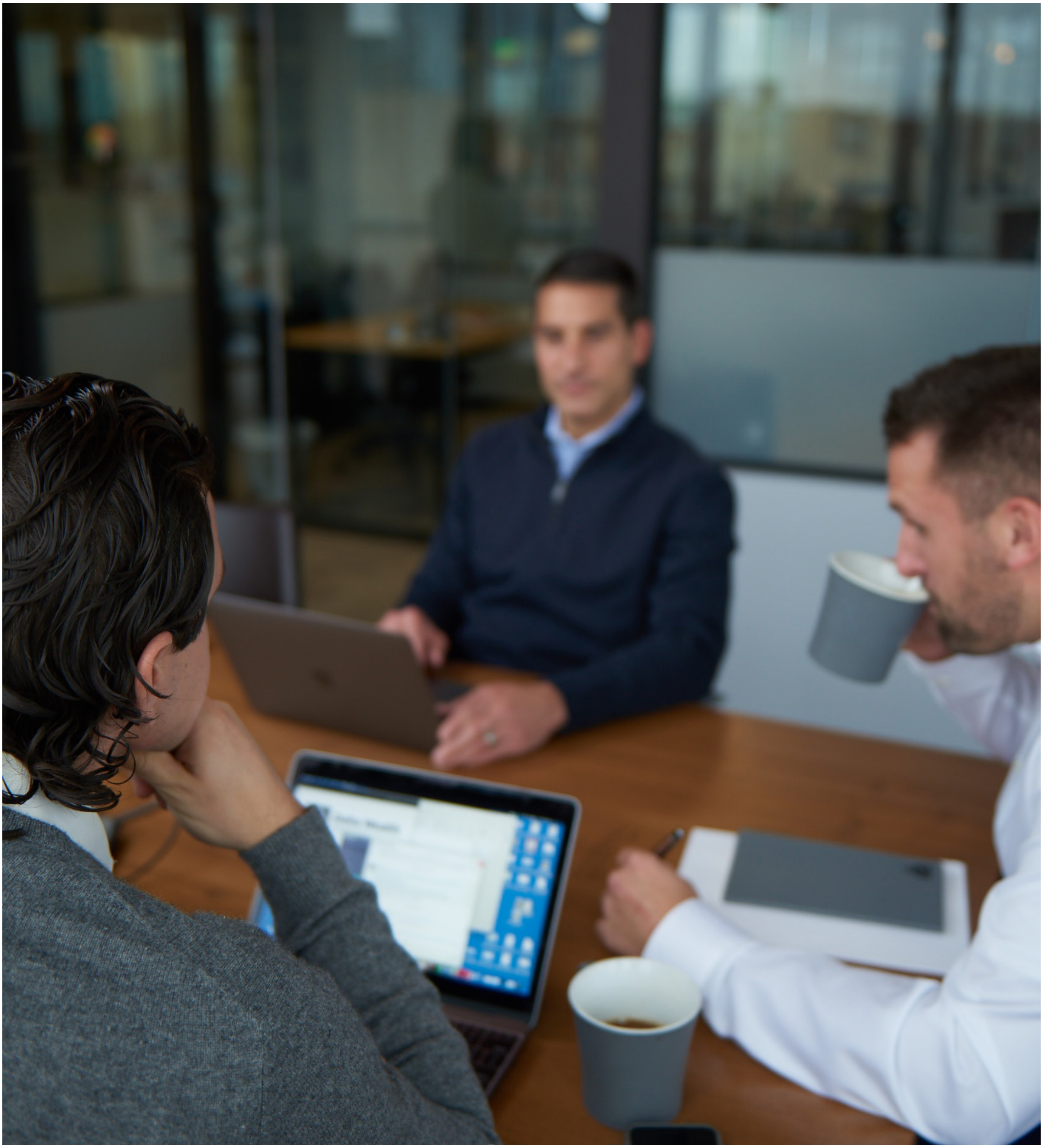


What’s Your Risk Number?

When you think of risk, it’s often a subjective, vague feeling. Or even worse, sometimes you’re bucketed into a risk group because of your age or assumed preference. Our approach is built on a Nobel Prize-winning framework that delivers you a specific Risk Number. Let’s find yours

Read more

Our Differences



Many financial advisors try to be everything to everyone. We're focused on working with entrepreneurs on growing their net worth.

To better serve our client niche, we've constructed a team of experienced professionals have knowledge of specific areas of wealth management—taxes, investing and planning—along with a deep knowledge of the client's financial situation. This allows our team to make tailored decisions that better solve your specific needs and be more impactful.

Client First

Each and every decision is made to best serve our clients. We do not sell any products or take commissions. Your interests come first, always.

Evidence Based

Rather than intuition, we let data drive our investment decisions. That way, we don't think we have the right answer—we know we do.

Experienced & Accredited

Our team of advisors are experts in critical areas of your finances—taxes, investments and planning. Drawing on their skills and experience, they deliver customized strategies to achieve your goals.

Featured In

US News and World Report

7 Best Corporate Bonds to Buy and Hold for 2019

Posted on 12/21/18

Niko Finnigan, co-founder of Delta Wealth Advisors in Indianapolis, says target date bond funds offer an attractive opportunity for buy-and-hold moves. "Target-date bond funds offer a yield to maturity, which means bondholders can calculate how much they can expect to earn until the bond fund matures at a given time," he says. IBDK may be …

Read more

US News and World Report

What Is a SEP IRA?

Posted on 03/20/19

U.S.News & WORLD REPORT

Dino Efthimiou, CFP

Niko Finnigan, CFA, CAIA

Ryan Robertson, CPA

QUICK LINKS

- Home
- Services
- Fees
- Tools
- People
- Insights
- Pay Invoice

GET IN TOUCH