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Our Services

Cardinal Wealth Management services include trust and estate planning, financial planning, tax planning, investment management, and wealth preservation strategies.

- Holistic Wealth Planning
- Investment Management
- Business Owner Consulting
- Special Needs Planning
- Non-Profit Consulting

The Cardinal Wealth Management holistic wealth planning process is an in-depth, personalized consultation that addresses all things financial as well as the emotional aspects of responsible stewardship.

LEARN MORE

Cardinal Wealth Management Process, Step 1: Interview

Gather all current financial data, establish a minimum lifestyle target in today's dollars after taxes, establish a reach lifestyle, and identify any unique financial or emotional goals.

LEARN MORE ABOUT OUR PROCESS →

01

Cardinal Wealth Management Process, Step 1: Interview

02

Cardinal Wealth Management Process, Step 2: Planning & Analysis

03

Cardinal Wealth Management Process, Step 3: Review the Findings

04

Cardinal Wealth Management Process, Step 4: Implement & Monitor

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Part 2A of Form ADV

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