

NAVIGATE YOUR

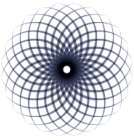
Financial Future

Your portfolio deserves personal attention
and expert advice.



WELCOME TO CENTERPOINT

Since 2001, we have been serving as



Investment Advisor (RIA) and Financial planner in Zionsville, Indiana.

We serve as a fiduciary, working with a diverse group of clients with a broad range of needs. Thus, we're as adept at managing an individual's retirement portfolio as we are a multi-million dollar family trust. Because of our breadth of experience, we bring a broad perspective and a value-added approach to your investment management, financial planning and family office needs.

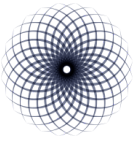
[Speak with an advisor](#)



GET EXPERT ADVICE

When you're facing significant financial decisions, making the right choices can feel intimidating.

Our team works with you to tailor a financial plan to help you stay on course, achieve your goals, and build wealth for the future.



Develop a plan to grow your portfolio strategically over time.



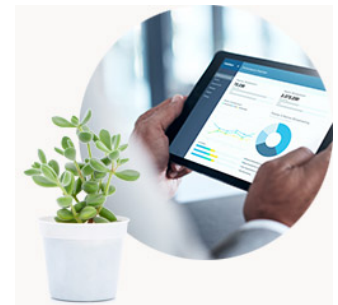
Get hands-on service and expert advice.



Manage your money with an eye on tax and cost efficiency.

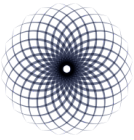
BUILD A PLAN

Don't settle for a one-strategy-fits-all wealth management plan or an investment risk profile that doesn't match your goals and needs.



Get honest and reliable financial advice

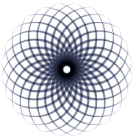
As independent advisors, our advice is not influenced by third-party affiliations, sales quotas, or incentive-based agreements with specific financial institutions. Your agenda is our only focus.



Your CenterPoint contacts are the members of our Zionsville-based team; not call center employees who are unfamiliar with your personal situation and financial needs.

Rest Easy

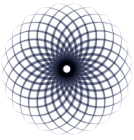
Understanding your finances and knowing who to turn to for advice can be overwhelming. At CenterPoint, our goal is to



hands-on support you need to
grow your portfolio carefully



“At CenterPoint, we work hard to avoid conflicts of interest, aligning our priorities with yours. We believe strongly that quality investments and a long-term, disciplined strategy generate more consistent risk-adjusted returns, and that tax and cost efficiency are vital to



management plan.

— Our Philosophy

Meet our team



**We're here to
help.**

**CenterPoint Wealth
Management**

56 N Main Street
Zionsville, IN 46077

(317) 973-7700

info@centerpointwm.com

Name *

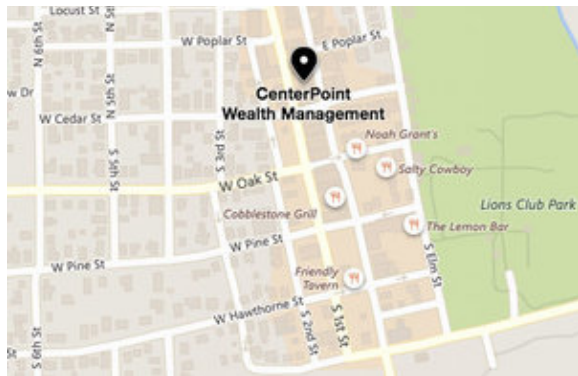
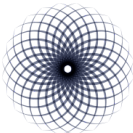
First Name

Last Name

Email Address *

Subject *

Message *



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