WHY **UNITED ADVISORS**

United Advisors Wealth Management is focused on helping our clients progress toward their individual financial goals. A team of professionals oversees the client's plan, strategy and portfolio and maintains regular client contact. Progress is our gauge: while no plan guarantees success, benchmarking the client's destination, rather than the investment fads and products of the moment, should increase the likelihood of goal attainment.

STRATEGIC WEALTH PLANNING

The basis for your investment strategy.

CLIENT-FOCUSED

The center of everything we do.

MONITOR PROGRESS

Towards financial goals.

ONGOING DISCUSSION

Regular Review Meetings.

CUSTOMIZE PORTFOLIOS

Through access to managers and technology.

SENSITIVITY

To Client Costs.

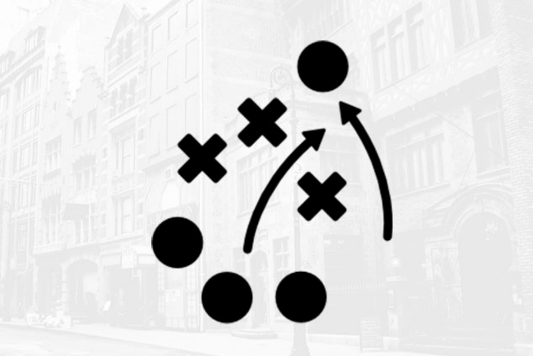
FEE-BASED APPROACH

Aligning Interests.

OUR CORE VALUES

Integrity

OUR **SERVICES**



(https://www.uawealth.com/project/strategic-wealth-planning/)

(https://www.uawealth.com/project/asset-management/)

(https://www.uawealth.com/project/strategic-alliances/)

CLIENTS

AND OUR MISSION

United Advisors Wealth Management firm is driven to help improve the financial position of each of our clients. The mix of skills and talents of our people is vital to serving client needs. We are dedicated to our clients and the communities in which we operate. United Advisors creates long-term relationships by knowing our clients' needs and addressing them with a team of skilled and disciplined professionals.

Our clients are generally long-term investors and tend to be either busy professionals or retirees. While working, they are entrepreneurs, corporate executives and other professionals with active lives and families. They generally have assets between $500,000 and $5 million and often complex financial situations. Many do not have sufficient time, interest or inclination to tend to their financial goals and recognize they need professional guidance to address issues ranging from retirement and estate planning to tax and investment strategy.

CONTACT **US**

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Message

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