



# Invest in your dreams

Discover the clarity of having  
a financial team on your side.

## ➡ Building & Growing

Your personal definition of financial success is exactly that: personal. Being clear on what you want out of life begins with partnering with a team that understands you, your goals and dreams, and has the financial strategy to help you achieve them.

Meet our multi-disciplined team of financial experts (</our-team-of-financial-specialists/>)

## Why Choose Cordant?

Living in a world of greater financial responsibility and more noise also means having to deal with more stress. That's where we come in. At Cordant Wealth Partners, we're here to make life easier. We put a team of financial experts on your side to help you achieve financial clarity. We then help grow, guide and manage your wealth. So you can focus on what's most important to you, and spend your time living your best life.

**[Discover the Cordant Difference \(/why-choose-cordant/\)](/why-choose-cordant/)**

Who We Serve

## Corporate Employees

By helping you clearly define your financial objectives we can optimize your company retirement programs and benefits, and help you sort through complex financial decisions like funding college, buying a second home, or assessing a new job offer—all while making sure you're on track for retirement.

**Move Towards Financial Success (/who-we-serve/corporate-employees/)**

## Business Owners

You've worked hard to develop your idea and create a successful company. Our team will work hard to build and execute a plan that integrates the goals you have for your business, yourself and your family.

**Align Business and Personal Objectives (/who-we-serve/business-owners/)**

## Retirees

With our retirement planning process, you'll have the confidence to pursue the retirement you dreamed of. And with us by your side balancing the risk and return in your portfolio and mitigating your tax responsibility, we help to reduce the worry along the way.

**Maintain Financial Independence (</who-we-serve/retirees/>)**

## What We Do

At Cordant, we focus on creating clarity for people to pursue their best life by eliminating financial stress. To do so, our team of experts works closely with you to understand your goals and your values and to design a purposeful financial plan that supports your personal vision of success, at every stage of life.

**Start Living Your Best Life (</wealth-management-services/>)**

Get Started with Our Free Wealth Management Resources



https://www.cordantwealth.com/diversifying-your-company-stock-strategies-for-navigating-the-benefits-of-diversification-

s-the-cost-of-paying-taxes-part-2/)

## Diversifying Your Company Stock: Strategies For Navigating The Benefits of Diversification VS. The Cost of Paying Taxes (Part 2)

(https://www.cordantwealth.com/diversifying-your-company-stock-strategies-for-navigating-the-benefits-of-diversification-vs-the-cost-of-paying-taxes-part-2/)

This past weekend, I had the joy of watching the movie The Sandlot with my 7-year old daughter and 4-year old son. My joy came from my kids laughing at all the moments in the movie that I laughed at the first time I saw

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rdantwealth.com/diversifying-stock-strategies-for-navigating-f-diversification-vs-the-cost-of-paying-taxes-part-2/)



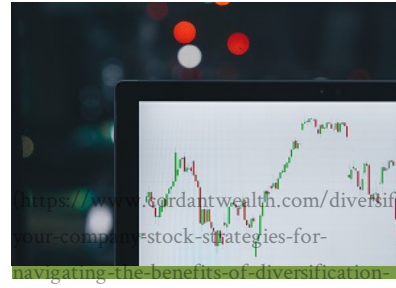
https://www.cordantwealth.com/10b5-1-trading-plans-going-under-the-hood/)

## 10b5-1 Trading Plans Going Under the Hood

(https://www.cordantwealth.com/10b5-1-trading-plans-going-under-the-hood/)

For busy corporate executives, managing personal finances with the rigors of a demanding job can be a lot to handle. But what happens when requirements from the corporate office directly impact the family finances? In this post we'll go under the hood to uncover the b...

Read More (https://www.cordantwealth.com/10b5-1-trading-plans-going-under-the-hood/)



https://www.cordantwealth.com/diversifying-your-company-stock-strategies-for-navigating-the-benefits-of-diversification-

vs-the-cost-of-paying-taxes-part-1/)

## Diversifying Your Company Stock: Strategies For Navigating The Benefits of Diversification VS. The Cost of Paying Taxes (Part 1)

(https://www.cordantwealth.com/diversifying-your-company-stock-strategies-for-navigating-the-benefits-of-diversification-vs-the-cost-of-paying-taxes-part-1/)

For many corporate employees, the accumulation and growth of their employer's stock over time becomes the source of significant wealth, but with that accumulation and growth the risk that comes along with investment co...

Read More (https://www.cordantwealth.com/diversifying-your-company-stock-strategies-for-navigating-the-benefits-of-diversification-vs-the-cost-of-paying-taxes-part-1/)



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(https://www.cordantwealth.com/diversifying-your-company-stock-strategies-for-navigating-the-benefits-of-diversification-vs-the-cost-of-paying-taxes-part-1/)

As Seen in the Following Publications



Bloomberg



Wealth Management.com



## About Us

At Cordant Wealth Partners, we specialize in comprehensive wealth management for individuals, busy professionals and business owners with the goal of helping every client live their best life. Our team approach means you benefit from skilled financial advisors who manage wealth holistically and personally. Using clear direction, informed strategy and tactical expertise, we build a plan that is customized for you and delivers results at every stage of life. Our solutions are transparent and objective, so you have peace of mind that your wealth is being well managed.

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## Blogs



**Key Considerations for Small Business Owners**

(<https://www.cordantwealth.com/key-considerations-for-small-business-owners/>)

July 3, 2019



**5 Critical Questions Business Owners Must Answer Regarding Retirement Planning**

(<https://www.cordantwealth.com/5-critical-questions-business-owners-must-answer-regarding-retirement-planning/>)

June 14, 2019



Three  
commonalities of  
clients who are  
happy with thei...

(<https://www.cordantwealth.com/three-commonalities-of-clients-who-are-happy-with-their-timeshares/>)

June 6, 2019

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### Get in Touch:

Phone: 503-621-9207 (tel:503-621-9207)

Email: [Info@CordantWealth.com](mailto:Info@CordantWealth.com) (mailto:Info@CordantWealth.com)

Address: 1211 SW 5th Ave #2310, Portland, OR 97204

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**[Business Continuity Plan](https://www.cordantwealth.com/business-continuity-plan/)** (<https://www.cordantwealth.com/business-continuity-plan/>)