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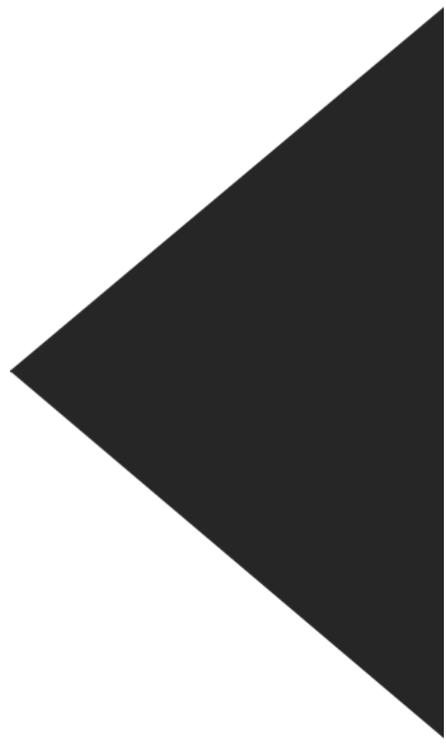
- [Meet IA](#)
 - [Our Mission & Core Values](#)
 - [Wealth Management Process](#)
 - [Meet Our Team](#)
 - [FAQs](#)
- [Our Services](#)
 - [Wealth Management Services](#)
 - [Our Investment Philosophy](#)
 - [Special Resources for Anesthesiologists](#)
- [Evidence-Based Investing](#)
- [Resources](#)
 - [White Papers & eBooks](#)
 - [Reports & Articles](#)
 - [Videos](#)
 - [Access Your Account Online](#)
- [Blog](#)
- [Fly Fishing](#)
 - [IA Fly Fishing Association Homepage](#)
 - [“Live the Stream” Event](#)
- [Get In Touch](#)
 - [General Information](#)
 - [Directions](#)
 - [Contact Us](#)
 - [Press Contact](#)
 - [Refer Us](#)



**Your goals
are personal.**

Our approach to achieving them is too.

Uniquely personalized wealth management –
built around your values, to optimize value.



**Tell Us
Your
Goals**

What is most important to you?

Through a consultative and objective wealth management process, we help bring focus to your greatest goals, so we can set the path to achieve them.

I want to...

First Name

Last Name

Email address:



ESOP

RMD

Efficiency

Tax Management

529 Plan

Budget

Estate Plan

Diversification

401k Plan

Spending

We bring clarity to your entire financial picture.

Our wealth management plans go far beyond just investments. We address all aspects that will help you achieve freedom from financial worry, and protect the legacy you've worked so hard to build.



Retirement Planning



Wealth Protection



Tax Planning



Giving Back



Estate Planning



Thinking About Relocating to a Zero-Tax State?

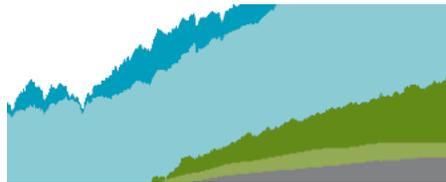
If you are considering moving to a no tax state, it's not as simple as just buying a property and claiming that you are a resident.

[Read the Post](#)



Evidence-Based Investing Insights

This 4-part video series shows you how to invest with greater confidence — and with evidence, not emotion, guiding your way. [Watch the Videos](#)



Pursuing a Better Investment Experience

In this white paper, we lay out the key principles to improve your odds of success through market dips and swings. [Download White Paper](#)

[View all resources](#)

Custom plans to fit your unique ambitions.

We come to you free of ulterior loyalties or preconceived solutions. Instead, we listen to what you have to say. We learn about your values, your interests, your relationships and goals — so that we can create the right plan for you. [See how it works](#)



Investment Philosophy

To make your wealth management plan a success, we utilize a Nobel Prize-winning, evidenced-based approach that is crafted to optimize your investment portfolio over time.





- **Diversify to Reduce Risk**

Most people understand the basic concept of “don’t put all your eggs in one basket”, but emotions can often override reason as stocks rise and fall. Truly diversified investors take a balanced approach and stick with it despite volatility in the markets.

- **Lower Volatility to Enhance Returns**

If you have two investment portfolios with the same average or arithmetic return, it is a mathematical fact that the one with less volatility will have a higher compound return. We design your portfolio with as little volatility as necessary to achieve your goals.

- **Employ Asset Class Investing**



Let’s Start with a Conversation

Schedule a complimentary, in-person session with our team to tell us more about your financial and life goals, and to learn just how we can help you reach them.

First Name

Last Name

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- give back to my community
- secure my family's financial future
- enjoy an early retirement
- add my own response

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 - [Wealth Management Services](#)
 - [Our Investment Philosophy](#)
 - [Special Resources for Anesthesiologists](#)
- [Evidence-Based Investing](#)
- [Resources](#)
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