

# Wealth Management

Carillon Point | Kirkland, WA  
(425) 406-6830

[Learn More \(/services/private-family-office.html\)](/services/private-family-office.html)



## Custom Portfolios

Bringing simplicity to the complexities of life. Through...



# Integrity

Live to the highest standard of integrity both professionally and personally.

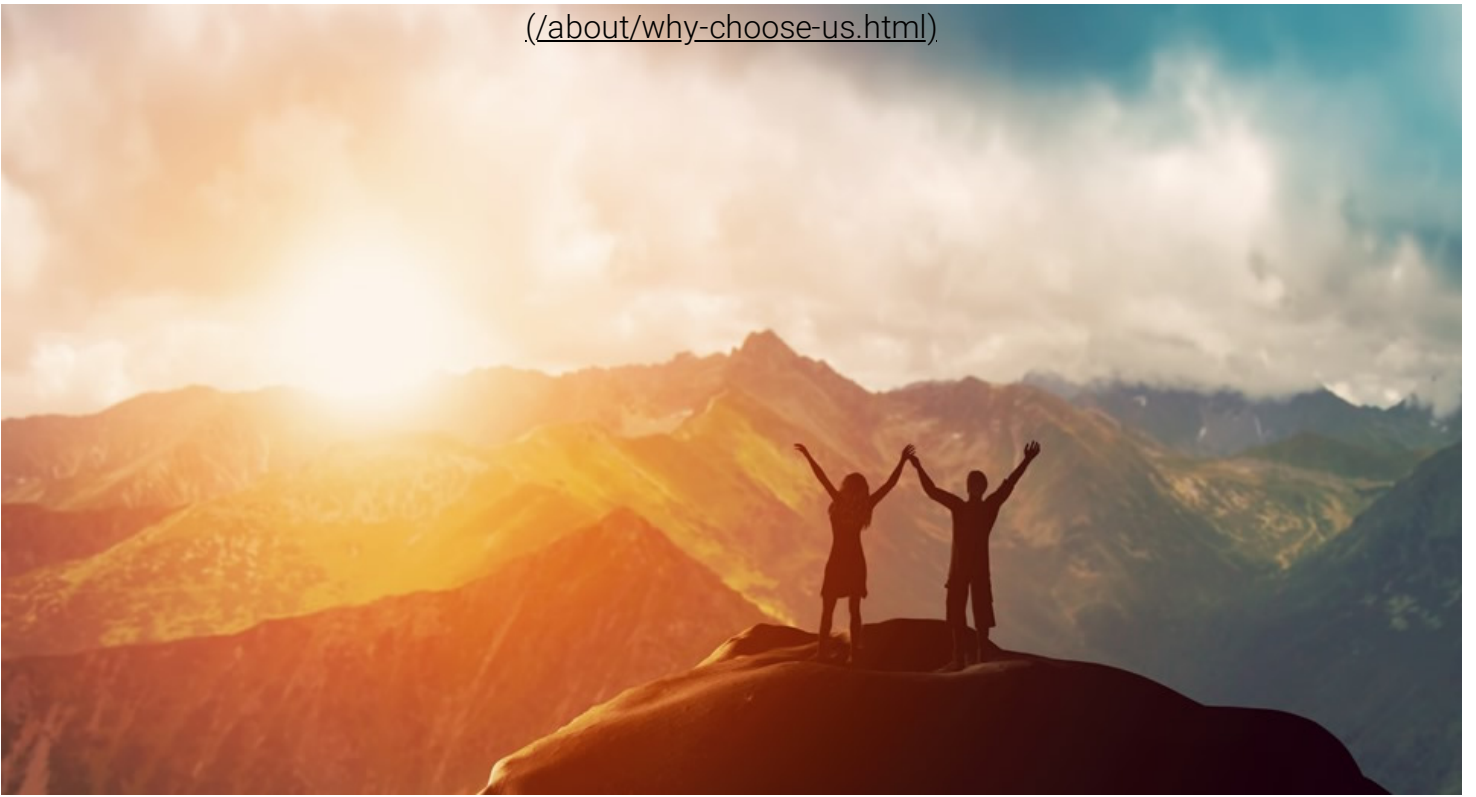
[\(/services/multi-generational-wealth-transfer-planning.html\)](https://www.fidelity.com/services/multi-generational-wealth-transfer-planning.html)



# Client Centric

Provide fair and full disclosure of all material facts and to act in the best interest of each client at all times.

(</about/why-choose-us.html>).



# Give More Than You Take

To make a material difference you must always give more than you take.

[\(/services/strategic-business-planning.html\)]((/services/strategic-business-planning.html))





# Excellence

Unwavering commitment without yielding to mediocrity.

# Comprehensive

Managing all the assets in your life.





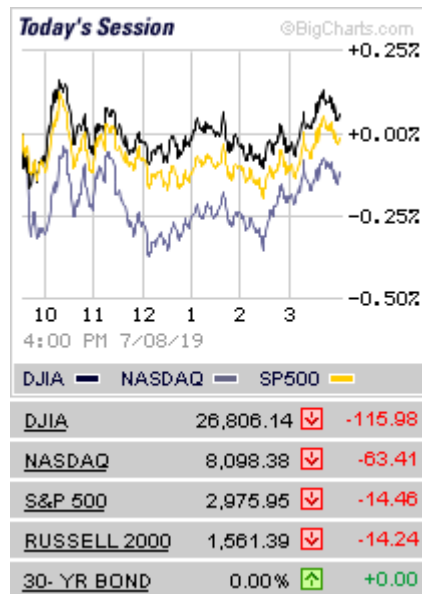




# Latest's Podcasts

Feed not found.

# Current Markets



## Market News

- [TreeHouse Foods to sell snack business for \\$90 million](http://feeds.marketwatch.com/~r/marketwatch/marketpulse/~3/B_3FzHKOSGU/story.aspx)  
([http://feeds.marketwatch.com/~r/marketwatch/marketpulse/~3/B\\_3FzHKOSGU/story.aspx](http://feeds.marketwatch.com/~r/marketwatch/marketpulse/~3/B_3FzHKOSGU/story.aspx))
- [Swalwell becomes first Democrat to drop out of presidential race](http://feeds.marketwatch.com/~r/marketwatch/marketpulse/~3/mJ2tMWZBH2w/story.aspx)  
(<http://feeds.marketwatch.com/~r/marketwatch/marketpulse/~3/mJ2tMWZBH2w/story.aspx>)
- [Stock market posts back-to-back loss as communication services, materials shares slump](http://feeds.marketwatch.com/~r/marketwatch/marketpulse/~3/YrXw5E230X8/story.aspx)  
(<http://feeds.marketwatch.com/~r/marketwatch/marketpulse/~3/YrXw5E230X8/story.aspx>)
- [DouYu sets IPO terms, to raise up to about \\$629 million](http://feeds.marketwatch.com/~r/marketwatch/marketpulse/~3/ycdWulZ91bo/story.aspx)  
(<http://feeds.marketwatch.com/~r/marketwatch/marketpulse/~3/ycdWulZ91bo/story.aspx>)
- [Disney recalls 80,000 Forky plush toys made in China for choking hazard](http://feeds.marketwatch.com/~r/marketwatch/marketpulse/~3/9n8yAWYLOll/story.aspx)  
(<http://feeds.marketwatch.com/~r/marketwatch/marketpulse/~3/9n8yAWYLOll/story.aspx>)

## Latest Blog Articles

[Transitional Wealth Planning](/blog-featured/49-transitional-wealth-planning.html) (</blog-featured/49-transitional-wealth-planning.html>)

Schedule a meeting to see if our services are right  
for you.

[Contact Us \(/contact-us.html\)](/contact-us.html)



# Contact us

Vita Intellectus

3400 Carillon Point


Kirkland, WA 98033

Phone: (425) 406-6830

Mail: [info@vitaintellectus.com](mailto:info@vitaintellectus.com) (<mailto:info@vitaintellectus.com>).

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