



# The Harvest Group

WEALTH MANAGEMENT FOR LIFE™

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## Harvest Wealth Management for Life™



The Harvest Group is a multi-generational family team of CERTIFIED FINANCIAL PLANNERS™ that takes a long-term perspective to growing individual and family wealth. Our fiduciary duty is to always act in your best interest, and we understand from first-hand experience that family wealth management is not just about money, but often involves complex, non-financial issues that include family dynamics, amicable conflict resolution, family business succession planning, and more.

**Our Values Statement:** As a family-owned business, we think of ourselves as a part of your extended family. Our shared values of respect, integrity and trust form the basis of every client relationship. Your family's future is our priority and we take pride in providing financial advice that can make a difference in your and your family's lives. At The Harvest Group, our mission



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## Wealth Management for Life™

Investment Management, Financial Planning, Insurance, and everything else needed to manage wealth over life cycles and lifetimes.



## Investment Management

Design and execution of discretionary investment strategies for individuals and families that maximize portfolio growth while minimizing exposure to risk.



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## Financial Planning

Analysis of your financial situation and objectives that delivers custom wealth management strategies to protect your goals at each stage of your life.



## Wealth Protection & Insurance

Insurance can be a cost-effective way to reduce risk, minimize life's uncertainties, safeguard wealth, and reduce tax liabilities.

It's an honor to know that clients trust and depend on us to guide them through both good and, more importantly, difficult life events.

Roger H. Ingwersen



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Just as a farmer prepares the land, plants the seeds, and grows his crop through the unpredictable season before the harvest, wealth management takes a similar approach.

The Harvest Group works with you to prepare your Lifetime Financial Plan. Our Investment Committee plants the seeds of your financial future by constructing and actively managing your custom investment portfolio, which, when combined with Lifetime Financial Management™, helps grow and safeguard your wealth against life's typical, as well as unexpected, events.

Our unique [Harvest Wealth Management for Life](#) puts it all together so that you can benefit from many harvests over the years, whether it's purchasing your first house, funding a child's college education, or, ultimately, enjoying in retirement the harvest bounties you built over your lifetime.





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Phone: 844-996-3300

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Last Name

First

Last

Last

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