



# INLET

PRIVATE WEALTH

CONSERVATIVE WITH CAPITAL  
CREATIVE WITH SOLUTIONS

Inlet Private Wealth was founded and structured to best serve its clients. We believe that effective wealth management is a deeply personal process, one that must be objective, engaged and based on each client's unique goals. Clients deserve tailored solutions and for our clients, there are no pre-determined style boxes or proprietary products. Instead, your individual aspirations dictate financial solutions that are custom-made for you.

## A TAILORED APPROACH

We take the time to learn your financial aspirations, evaluate your personal circumstances and then provide honest, independent advice. Our experienced team works collaboratively

with you to protect and grow your wealth by employing customized financial solutions. Clients deserve a deliberate and dedicated partner committed to working alongside them while being respectful of the fact that it is their wealth.

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## LOCALLY MANAGED TRUST SERVICES

Inlet Private Wealth & Trust works with the clients' estate planning professionals to provide consistent trust services that clients desire. By working together, Inlet Private Wealth, Inlet Private Wealth & Trust and estate planning professionals can build a strong foundation for clients by providing solid trustee and investment management solutions to protect and grow their wealth while providing peace of mind for the future of their estates.

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