

# Life Planning Focused on Growing and Protecting

What's Your Risk Tolerance?

## Welcome to Avaii Wealth Management

## Join our Team

Avaii Wealth Management was created based on a few common sense approaches to financial planning and wealth management – put our clients first, provide actionable ideas in an unbiased way, and to speak in a language our clients can understand. This led us to our overarching life planning strategy.

The word avaii can be traced back to latin roots for “life plan” and that’s exactly what we provide. Too often, we see products being sold for the benefit of the provider rather than financial plans and strategies being used for the benefit of the client. **Our team** dropped the sales approach and focuses on acting in the best interest of every client we serve.

We believe that if we always put our clients first, create and implement plans with our clients based on their goals and dreams, and be genuinely grateful for the trust our clients place in us, we will continue to enhance financial futures and build lasting relationships.

[Start Life Planning Today](#)



## Services

### **Financial planning for all stages in life**

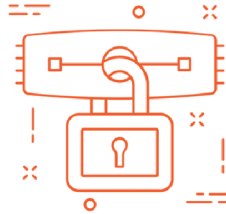
We understand that financial needs aren't cookie cutter, so we offer customized solutions to help you reach your goals. Services include:



Fee-Based Planning



## Asset management



## Insurance products



## Retirement Cash Flow Management



## Tax reduction strategies

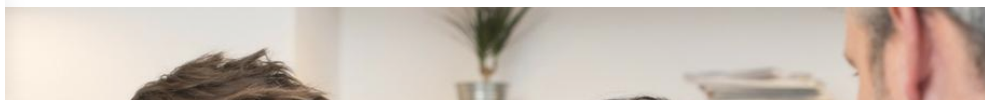
Talk To Us To Get Started

## From the Blog

JUNE 17, 2019

### Avaii Team is Growing

Avaii Wealth Management is growing and with growth comes change. We say good bye and thank you to Andrea Krueger and Shelley Mack and announce our new Director of Communications, Katie Six. We are confident her full-time focus will bring consistency, attention, and great value to you, our clients. Katie will be the first point of contact for clients, as well as help setting up appointments. She is focused on learning the unique needs of our clients and adapting Avaii to communicate using the most appreciated and preferential means. She will also be developing content to bring an added impact and relevance via our communication streams such as social media, blog, newsletter, ongoing seminars, and more.





OCTOBER 3, 2018

## Avaii Wealth Management: How Our Independence Benefits You

It's not often in life that you get the opportunity to make your dream a reality, so it is with great excitement that I announce my new firm, Avaii Wealth Management. After almost 20 years in the finance industry, I took a leap of faith and founded Avaii Wealth Management with Jeff Rainer (Founding Wealth Advisor) and Joel Blattner (Founding Director of Investments and Planning). In our work at our previous firm, we felt that we were serving our clients in the same way an independent advisor would, but some changes were announced that pushed us to truly become independent and continue to act as fiduciaries for our clients.

[Read More](#)



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MANAGEMENT

NAME

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# Client Center



**Black Diamond**



**Fidelity**

**Client Center**

**Contact Us**

**Disclosures**

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