



Every day, the sun rises in the east and sets in the west. Time continues to pass.

Are you making financial decisions that are aligned with your goals and within the context of your life?

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## Our Mission

To empower clients, like you, to become the stewards of your family wealth and to turn your personal success and dreams into a life filled with direction, purpose, happiness and confidence, while always sustaining your multi-generational family wealth, unity and legacy.



## Who We Are

Endowment Wealth Management, Inc. is a SEC Registered Investment Adviser (RIA) using a Multi-Family Office (MFO) structure who's sole goal is to protect our clients like you and your most valued asset: **Your Family.**

We professionally provide our clients with holistic, fee-based, fiduciary wealth management services utilizing the 3-D Endowment Investment Philosophy™.

Ultimately, we encapsulate our clients personal risk tolerance and goals with our disciplined vision and deep-rooted professional expertise to give our clients direction, confidence and peace of mind so they can fully enjoy each day and plan for their family's tomorrows to be the fullest!

Endowment Wealth Management, Inc. | Investment Services in Appleton



relationship wherein one person has an obligation to act for another's benefit. The duties of a fiduciary include loyalty and reasonable care of the assets within custody.

Schedule Your Free Wealth Consultation Today →

Clients in...

Offices in...

# Endowment Wealth Management CIO Prateek Mehrotra Named Investopedia Top 100 Advisor 2018



Endowment wealth management™ inc. ("EWM") is a registered investment adviser serving clients throughout the United States. EWM and its representatives are in compliance with the current registration filing requirements imposed upon state registered investment advisers by those states in which EWM maintains clients. EWM may only transact business in those states in which it is registered, or qualifies for an exemption or exclusion from registration requirements.

## Recent Posts

Work Smarter—Not Harder!

EWM Weekly Capital Market Highlights for Week Ended 6/28/2019

Endowment Index™ Posts Slight Gain for Week Ended 6/28/2019

The Endowment Index™ Posted a 2.13% Gain for Week Ended 6/21/2019

## My Tweets

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