



PORTFOLIO CHECKUP

By Creative Planning

Awarded the #1 Independent Wealth Management Firm in America – Barron’s (2017)

Our fierce **commitment to independence** means you get unbiased advice, not sales. No hidden fees, commissions and none of our own mutual funds or hedge funds to cloud our vision or create conflicts of interest. We are singularly focused on providing advice and solutions that champion your best interests.

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Get a Second Opinion from Creative Planning

SCHEDULE CALL



([http://portfoliocheckup.com/wp-admin/1-](http://portfoliocheckup.com/wp-admin/1-wealth-management-firm-america-2015/)

wealth-management-firm-america-2015/)
#1 Wealth Management Firm in America

(2015)

READ MORE ([HTTP://PORTFOLIOCHECKUP.COM/WP-ADMIN/1-WEALTH-MANAGEMENT-FIRM-AMERICA-2015/](http://portfoliocheckup.com/wp-admin/1-wealth-management-firm-america-2015/))

Worth (/the-top-100-wealth-

advisors/)

Peter Mallouk Named to Worth Magazine's
Power 100 List

(2017-2018)

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BARRON'S

([http://portfoliocheckup.com/1-wealth-management-](http://portfoliocheckup.com/1-wealth-management-firm-america-2017/)

#1 Independent Wealth Management Firm in
America
firm-america-2017/)

(2017)

READ MORE ([HTTP://PORTFOLIOCHECKUP.COM/1-WEALTH-MANAGEMENT-FIRM-AMERICA-2017/](http://portfoliocheckup.com/1-wealth-management-firm-america-2017/))



(/creative-planning-named-to-top-ria-list/)

Named Top RIA list in America

(2014-2018)

READ MORE ([/CREATIVE-PLANNING-NAMED-TO-TOP-RIA-LIST/](/creative-planning-named-to-top-ria-list/))

The New York Times

"Creative Planning, is at the vanguard of a profound shift in finance: the move away from brokers and mutual fund companies peddling products for a fee, and toward firms offering truly independent, low-cost investment advice."

Read Full Story Here (<https://www.nytimes.com/2017/06/21/business/dealbook/a-kansas-investment-firm-spurring-change-on-wall-street.html>)

#1

Ranking

*Ranked the #1 Wealth
Management Firm in
America by Barron's
(2017)*

\$40

Billion

*Assets Managed by
Creative Planning
as of 04/13/19*

50

States

*Providing financial
peace of mind in all 50
states!*

**Discover the True Meaning of
Transparency**

Regardless of what the TV commercials insinuate, the vast majority of name brand firms are technically “brokers.” This means they get paid for putting your money in products or funds that benefit the house. We offer a refreshingly unbiased approach where we resolutely support your financial health, steer progress, and act as your legal fiduciary by upholding your interests above our own.

SCHEDULE A COMPLIMENTARY CONSULTATION

The Only Source of Knowledge is Experience.

-Einstein

Established in 1983, we demonstrate our devotion to taking excellent financial care of our clients by surrounding them with a team of credentialed experts. Our team includes CERTIFIED FINANCIAL PLANNER™ professionals (CFP®), Certified Public Accountants (CPA), Estate Planning Attorneys (JD), Risk Management Specialists and Retirement Planning experts.



Everyone Deserves the Ultra Wealthy Treatment.

Our holistic family office approach offers a full range of experts from every relevant field. This sets us apart from other independent financial advisors that typically only offer investment advice. Creative Planning gives you multidimensional advice – true comprehensive wealth management that is normally reserved for only the ultra-wealthy.

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Find out how we can help you succeed. See if you qualify...

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Providing financial peace of mind in all 50 states!

Contact Us / (844) 850-1717 (tel:18448501717)

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