



**YOUR GOALS**

OUR EXPERTISE

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## COMPREHENSIVE WEALTH MANAGEMENT AND FINANCIAL PLANNING

Integrated Wealth Management (IWM) provides you access to a highly skilled and experienced group of professionals who provide a collaborative approach in analyzing your goals, helping to define a vision for your future and creating the appropriate course of action to maximize your potential for success.

## INSTITUTIONAL INVESTMENT MANAGEMENT

The strength of IWM is truly enhanced by the quality of its investment committee, which consists of an experienced collection of professionals, including multiple Chartered Financial Analysts (CFA's) with years of combined investment experience.

## BOUTIQUE SERVICE

We are large enough to provide unbiased professional advice but with the agility, passion and creativity to focus on your unique needs.

## INTEGRITY AND TRUSTWORTHINESS

With a reputation for integrity, IWM has been the trusted advisor to a growing number of families since 2002. You can have confidence that we care about you, what's important to you, and your financial health.

WHO ARE WE?



4800 N. Scottsdale Road Suite 1900  
Scottsdale, AZ 85251

☎ 480-663-6000

📠 480-663-6033

✉ [info@iwmlc.com](mailto:info@iwmlc.com)

### Legal and Privacy Policy

Securities offered through Geneos Wealth Management Inc. Member [FINRA](#) & [SIPC](#). Investment advisory services offered through Integrated Wealth Management, LLC, a Registered Investment Advisor.

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