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Welcome to OptiFour Integrated Wealth Management

The whole is greater than the sum of its parts.

Imagine a world where all of your wealth management, legal, tax, and risk management needs could be addressed under one roof.

At OptiFour Integrated Wealth Management, we make that dream a reality. Since 1997, we have served as a one-stop-shop for the financial, tax, and estate planning needs of high net worth individuals, families, and small business owners.

Motivated exclusively by our clients' best interests, our synergistic and team-driven approach provides a truly unparalleled planning experience. Our strategies work seamlessly across each discipline, eliminating potential gaps in your plan while ensuring every facet of your financial life works in unison.

Our Guiding Principle

The Highest Standards of Care

As an independent firm, we believe that our clients deserve the highest standard of care possible, the Fiduciary Standard. Free of commissions and conflicts of interest, our fee-based advisors provide maximum transparency and a total focus on our clients' continued success.

LEARN MORE

“Plans fail for lack of counsel, but with many advisers they succeed.”

- King Solomon

A New Approach to Planning

At OptiFour, we ensure the whole of your financial life is greater than the sum of its parts. Our holistic approach to planning provides a strategic roadmap for managing your wealth, protecting your assets, and confidently pursuing your lifetime goals.

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“You’ve got to be very careful if you don’t know where you are going, because you might not get there.”

- Yogi Berra, Athlete and Philosopher

Take control and learn about where your money can go today

Take the first step with our library of resources



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Management



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Planning



Tax Strategies
& Services



Risk
Management

Contact

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