



A LIGHT. A PLAN. A PATH.



YOU

We work with curious, motivated savers who are seeking education and guidance to balance your current needs with your dreams and goals of the future.



YOU

OUR WORK

What We Do For You

As an independent, **fiduciary**, **fee-only** firm, we provide holistic, total wealth management solutions. We use **tax aware**, **evidence-based investing** strategies and bring institutional-level expertise and service to each relationship.

Our Work

YOUR TEAM



LUMIA
WEALTH

We are your fiduciary. We are a family firm.

We are a locally owned, second-generation family firm. David Imhoff started the firm in 2002 with the goal of bringing simplicity, transparency, and unparalleled service to his clients, coupled with an investment philosophy grounded in unbiased, academic research. We strive to uphold those principles as the firm continues to grow with clients who appreciate an approach that is decidedly *not* Wall Street.

We will shine light, prepare a plan, and provide a path.

Your Team



Lumia Wealth | Overland Park, KS

ABOUT LUMIA WEALTH

The team at Lumia Wealth can help you achieve your financial goals through our holistic, total wealth management approach. We are an independent, fiduciary, fee-only firm that leverages a deep experience base paired with data-driven investing strategies to deliver comprehensive financial planning and investment management. Let us show you how A Light, A Plan, A Path, can impact your future for the better.

CONNECT WITH US

6420 W 95th Street
Suite 202
Overland Park, KS 66212

Phone: **913-381-0280**
wealthinfo@lumiawealth.com

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