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WHAT IS YOUR FINANCIAL FREEDOM?

We strive to serve our clients during the financial planning process through deep and meaningful relationships that last for generations.

WELCOME

Keyes, Stange & Wooten Wealth Management, LLC is a Registered Investment Advisor, registered with the SEC, which provides client-focused, fee-based financial planning and financial consulting services to our clients. Our valued clients include individuals, business entities, trusts, estates and pension plans. We trust you will find our website useful. Call us for a comprehensive review of your portfolio and planning opportunities. We look forward to hearing from you soon!

(Registration does not imply a certain level of skill or training.)

OUR SERVICES

WEALTH MANAGEMENT (/PRODUCTS-SERVICES/WEALTH-MANAGEMENT)

☰

Portfolio Management – Custom and model portfolio investment management built on a foundation of research and global diversification. Portfolio construction emphasis is on companies of smaller capitalization, higher profitability, and lower price to book value.

EMPLOYER-SPONSORED RETIREMENT PLANS (/PRODUCTS-SERVICES/EMPLOYER-SPONSORED-RETIREMENT-PLANS)

Plan Design and TPA Review – For new plans, work with Third Party Administrator to design a plan that maximizes tax benefits consistent with desired funding goals. For existing plans, review current design, cost, and plan provisions to determine if amendments and/or changes can improve funding o

ESTATE PLANNING

Transition Planning – Work with client's legal counsel to review Wills, Trusts, and Powers of Attorney to make sure they are up to date and coincide with clie

RISK MANAGEMENT (/PRODUCTS-SERVICES/RISK-MANAGEMENT)

Insurance Protection:

- Long-term Care Insurance

- Disability Insurance

- Life Insurance

OUR TEAM

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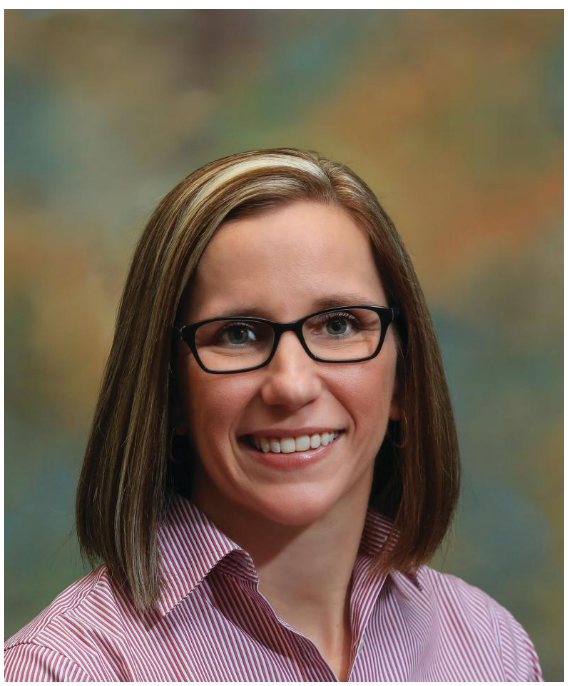

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