PERSPECTIVE
Wealth Partners

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Perspective Wealth Partners is a fee-only Registered Investment Advisor based in Boise, Idaho. Serving clients and making a profound difference in their lives is why we are in business. It is our aim to serve clients thoroughly and comprehensively, forging life-long partnerships.

Perspective Wealth Partners offers clients a comprehensive approach to wealth management. Our clients rely on us to generate financial plans that match their goals and tailor investment portfolios to their plans. In addition, our clients use Perspective Wealth Partners as a key resource for advice and for referrals in other financial areas including estate-planning, tax-planning and preparation, and insurance.

Our typical client:

a) is committed to setting and taking actions that serve long term goals
b) is comfortable trusting and partnering with an advisor in meeting those goals, and
c) is aligned with a structured/index-based investing philosophy

Our service model combines face to face meetings with extensive use of telephone, email, and web-based communication. We have clients in 9 states and are available during business hours in three time zones. Our clients have full internet access to their accounts 24 hours a day, 7 days a week.

Generally our clients have investible assets of greater than $500,000, but we do not have a minimum.

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