Optimize Your Most Important Business: **Your Wealth Management**

How We Optimize Wealth
(https://www.chicagopartnersllc.com/your-experience/)

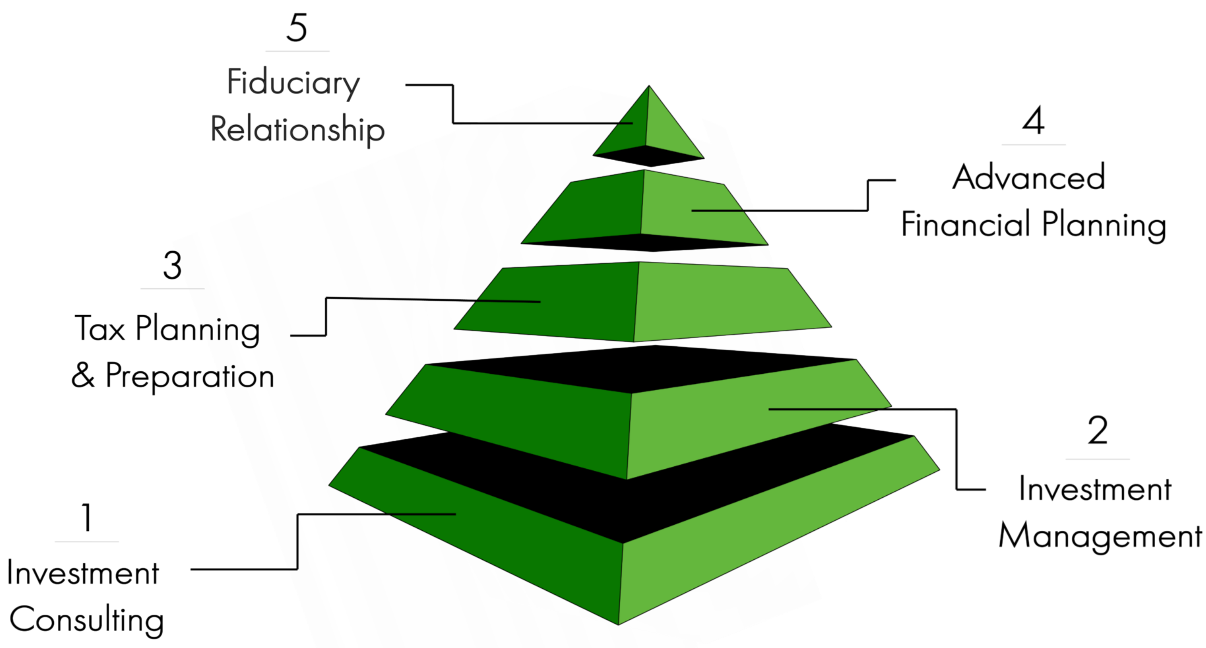
Our Wealth Management Philosophy

We take a holistic view of finances - your wealth works best when each part is optimized for your specific financial situation.

By breaking down each of the five major aspects of financial wellness, our clients receive a customized financial solution encompassing each dimension of their financial life.

The 5-Step Wealth Optimization Process is our approach to wealth management - it covers investment selection, portfolio creation, tax planning & preparation, and financial planning.

Each client relationship is upheld by the capstone: the Fiduciary relationship. The Fiduciary Standard is the highest standard of quality for financial advisors, which we embody every day at Chicago Partners.



Our Process ›

(https://www.chicagopartnersllc.com/your-experience/)

Over 150 Years of Investment Experience

Our financial advisors are specialists in creating custom wealth management plans.

With over 150 years of experience, our Partners have the knowledge and expertise to build you a comprehensive financial plan to optimize your wealth and secure your legacy.

Meet the Team

(https://www.chicagopartnersllc.com/your-financial-professionals/)

A Better System for Personal Finance

Wealth Management System (WMS)

After becoming a client, you'll work with your team to set up your WMS account.

Your WMS account tracks your income & expenses across your personal financial life. You'll be able to monitor your budget, view your account, and view the cash flow plans you and your team will create.

WMS is generally only used by family offices of the ultra-wealthy, but, as a client, you'll receive access at no extra cost.

Wealth Management Solutions

High Net Worth

- Investment Consulting
- Custom Portfolio Creation
- Tax-Efficiency Management

- Tax Document Preparation
- Financial Planning
- Retirement Planning
- Cash Flow Planning
- Estate & Trust Planning

Complex financial situations call for complex solutions.

Your team of experienced financial professionals will work with you to create a comprehensive, custom wealth management plan.

Your master plan will include investment, tax, & financial planning, curated by your team of fiduciaries, each held to the Fiduciary Standard, so you can feel confident your wealth is securely & expertly managed for you and your family.

Learn More

Covered & Restricted Persons

- Compliance Management
- Compliance-friendly Portfolios
- Portfolio Creation & Oversight
- Tax Document Preparation
- Comprehensive Financial Planning
- Rollover Preparation

Our financial professionals leverage their experience building compliance-friendly plans for Big 4 accounting professionals to create financial plans that meet the compliance needs of your company & optimize your investment portfolio.

Learn More

Foundations & Institutions

- IPS Creation
- Planning for Annual Withdrawals
- Navigating Account Landscape
- Building Plan Around Goals

Our wealth management team can guide you through navigating the complex rules of taxes and investments while balancing cash flow needs, creating a solution that secures your cash while generating your income needs.

Learn More

Corporate Cash Management

- Outpacing Inflation
- Liquid-ready Assets
- Account Oversight

- Higher Return on Investment*
- Encouraging to Investors
- Low Management Fee

Excess cash in corporate accounts can often lose its value to inflation and other risks.

Our team builds solutions for outpacing inflation while keeping your business's assets liquid, securing your excess cash while staying available for your company's purchases.

Learn More >

Family Office

- Comprehensive Wealth Management
- Responsive to Everyday Needs
- Your Family's CFO

- Fund & Manager Analysis
- Consolidated Performance Reporting
- Benchmark Analyses & Comparisons
- 36 Basis Points (0.36%) Fee

The needs of ultra-high-net-worth individuals are often ultra-complex and require constant vigilance.

Our team leverages our experience building comprehensive financial plans to keep your family's wealth secure while helping you accomplish your day-to-day goals.

Learn More

Financial Tools

Use these financial tools to help you plan, project, and monitor your wealth

(https://www.chicagopartnersllc.com/your-plan/)

Wealth Blog

Stay up to date with the latest strategies, tips, and news from the financial industry

(https://www.chicagopartnersllc.com/your-resources/wealth-blog/)

Advanced Financial Planning

(https://www.chicagopartnersllc.com/advanced-financial-planning/)

Fiduciary Relationship

(https://www.chicagopartnersllc.com/fiduciary-relationship/)

Disclosure

(https://chicagopartnersllc.com/important-disclosure-information/)

Form ADV

(https://www.chicagopartnersllc.com/wp-content/uploads/2018/11/2018-Form-ADV-Part-2A.pdf)

(https://www.chicagopartnersllc.com/your-resources/your-learning-center/wealth-blog/)

Wealth Videos

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