

NEXT GENERATION WEALTH MANAGEMENT

A comprehensive technology platform and proven investment strategies.



An Integrated Wealth Management Solution.

GeoWealth is a leading provider of wealth management technology; combining a comprehensive and fully-integrated platform with best-in-class portfolio solutions. Our customizable open-architecture platform and our proven spectrum of investment strategies address all essential needs of investment advisors and institutional investors by helping them grow faster and serve their clients more efficiently.

Our Process

Our process is dynamic rather than static.

In a world that changes constantly, it makes sense that your clients' needs will, too. That is why we have designed our process to adapt quickly to those changes.

01
CLIENT SERVICE TOOLS

Client Portal and Document Vault

CRM (Prospecting/Client Service)

MONEY WORKS. PRECISELY.

Schedule a Demo

444 N. Michigan Ave, Ste 820

Chicago, IL 60611 (<https://goo.gl/maps/AKXWPrEyYwN2>)

p 312.219.9160

e connect@geowealth.com (<mailto:connect@geowealth.com>)

Contact (<https://geowealth.com/about-us/contact>) | Privacy Policy (<https://geowealth.com/privacy-notice>) |

ADV Part 2A (<https://geowealth.com/wp-content/uploads/2019/04/ADV-Part-2A.pdf>)

Designed by Tri-plicity Design + Marketing (<http://smallbusinessmarketingkc.com>)