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Welcome to IFP Plan Management

Being named as one of the "Top 50 Wealth Managers" by Forbes is one of the reasons IFP Plan Management is proud to be part of Independent Financial Partners, an Independent SEC Registered Investment Advisor. Forbes gives the award annually based on total assets under management. Our more than 400 advisors have assets under management of \$2.7 Billion and another \$26.7 Billion we serve in a consulting capacity for retirement plans.

Our team of advisors is dedicated to providing our clients with knowledgeable, experienced, comprehensive advice on their company's 401(k) / 403(b) plans. We work for each participant on an individual basis. We start by assisting you in completing an Investor Profile Questionnaire and determining your asset allocation. We provide ongoing advice and management of your account and monitor your progress.

Individual



We will help you create a personalized asset allocation, implement those strategies and monitor your progress. We will serve as trusted advisors on your account and manage your portfolio based on the highest global industry standards.

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Non-Profit



We not only work with individuals who have 401(k) plans, but we also work with people who have 403(b) and TSA plans as well.

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Employers



Our advisors provide your employees access to professional management of their company sponsored retirement plan at no cost to the employer.

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