

(<https://www.persiumgroup.com/>)



Strategic Wealth Advisory

Advising business owners, retirement plan committees, and individual investors in pursuing their financial goals.

Business Owners
(<https://persiumgroup.com/wealth-management-for-business-owners/>)

Wealth Management
(<https://persiumgroup.com/wealth-management/>)

Retirement Plan Oversight
(<https://persiumgroup.com/retirement-plan-oversight/>)

We are wealth advisors who specialize in guiding clients towards achieving long term financial freedom. When you have a personal relationship with a trusted advisor helping you navigate big decisions and are no longer stressed about money, you are free to focus on the things that really matter to you.



(<https://persiumgroup.com/o2i/>)

Wealth Management for Business Owners

As a business owner, you're different from other investors. Your money is tied up in your business. Because of that, you require a different approach.

Our team of wealth managers specializes in helping business owners build and manage their personal portfolios.

We've developed the Owner to Investor (O2I) framework (<https://persiumgroup.com/o2i/>) specifically for you, the business owner, to address your unique needs and realities directly, build personal assets, and pursue financial freedom.

Learn more (<https://persiumgroup.com/wealth-management-for-business-owners/>)

Business Owner's Pre-Exit Financial Checklist

As you prepare to exit your business, you need to learn to be an investor to advance your post-exit financial goals.

Download now (<https://persiumgroup.com/checklist/>)

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Persium Group consists of three teams: Persium Advisors — wealth management for business owners (<https://persiumgroup.com/wealth-management-for-business-owners/>) and other investors, NAVIX — exit planning for business owners (<https://www.navixconsultants.com/>), and CoVerity (<https://persiumgroup.com/retirement-plan-oversight/>) — serving the needs of retirement plan committees.



The Persium Group, formerly known as White Horse, is an independently owned and operated firm that was founded in 2004. In 2010, White Horse Advisors, LLC registered with the Securities and Exchange Commission as an investment adviser allowing us to operate in a product neutral, fee-only investment environment.

At Persium Group, we offer three distinct lines of business. Persium Advisors, LLC is an SEC registered investment adviser offering traditional investment advisory and asset management services. CoVerity™ is a brand name through which we provide investment advice and consulting services to sponsors of qualified retirement plans. Through NAVIX®, we provide exit planning services to owners of closely held businesses.

Persium Advisors, LLC and its affiliates do not provide tax or legal advice. Clients are urged to consult their tax or legal advisors to understand the tax and legal ramifications of any actions or investments recommended by Persium.