Your **Legacy** Is Our **Strategy**

Integrity is a Registered Investment Advisor that provides leadership and expertise in wealth management and business financial planning.

FINANCIAL WELLNESS REVIEW

ABOUT US

Working with Integrity

Integrity is a Registered Investment Advisor that provides leadership and expertise in wealth management, business financial planning, and legacy planning. We strive to deliver an exceptional client experience through tailored solutions to meet our client's most complex financial challenges. Our holistic planning empowers you to build a financial legacy and successfully pass it on to your family and charitable causes.

Whether you are just starting out or already enjoying retirement, we help countless individuals just like you. Our advisors serve a wide array of clients including individuals, affluent families, small businesses, institutions, and non-profits. No matter the scope of your business or the size of your account, we can create a customized financial plan that is tailored to your unique situation and investment goals.

SERVICES

Core Competencies

Wealth Management

Business Financial Planning

Retirement Plan Management

Family CFO

Generosity

Credit and De Managemen

Investment Management

Insurance Planning

Technology

Tax Optimization

Estate Planning

Income Planning

Technology

A crucial part of any investment advising solution is the client's ability to easily access account information in real-time. A best in class technology suite should be available to accomplish this goal. In addition, a fully integrated suite provides clients with the ability to organize and prioritize short-term and long-term investment and financial goals. The ability to access and utilize a robust technology platform substantially enhances the client/advisor relationship.

Estate Planning

Estate planning is a critical part o financial health. These strategies your family's wealth beyond your Financial advisors will not only be plan, but will also be able to conn help you establish the optimal le

MISSION

Our Core Values

We believe strongly that our dedication to our core values is paramount in all relationships, recommendations and strategies.

In a world defined by rapid change and information exchange, it is critical to have access to first-class resources, strategies and solutions. In addition to investing in robust technology applications, Integrity strives to be at the forefront in developing diversified solutions that integrate new investment concepts with traditional portfolio management leveraging best in class technology platforms.

Due to an evolving economic
heightened market volatility, p
ensuring our investors' financi
disciplined approach to financ
expertise with the diverse kno

CLIENTS

Who We Work With

Our clientele consists of individuals, families, and entrepreneurs from a range of backgrounds and geographic

Office | Entrepreneurs | Accredited Investors | 401(k)

PEOPLE

Meet Our Team

Our team of experienced private client advisors and consultants are here for you, your family and your business

KRISTOFER GRAY
Principal & Founder

LOCKWOOD HOLMES
Chief Executive Officer

DEANN CROSS
Chief Operating Officer

SARAH ARCHER
Chief Investment Officer

ADMA WON
Financial

SEE THE WHOLE TEAM

EDUCATION

Latest Articles

Our commitment to providing our clients with access to educational resources empowers them to reach their financial goals.

By Adam Anschultz | October 15, 2018

Quarterly Update: October 2018

By Integrity Financial |

Understanding Private

As public equity markets co
with the expectation that or

By Integrity Financial | May 21, 2018

[401(k) Asset Allocation]

[401(k) Asset Allocation According to the US Census, roughly 32% of all Americans are actively utilizing a 401(k) plan to..]

By Integrity Financial | September 10, 2018

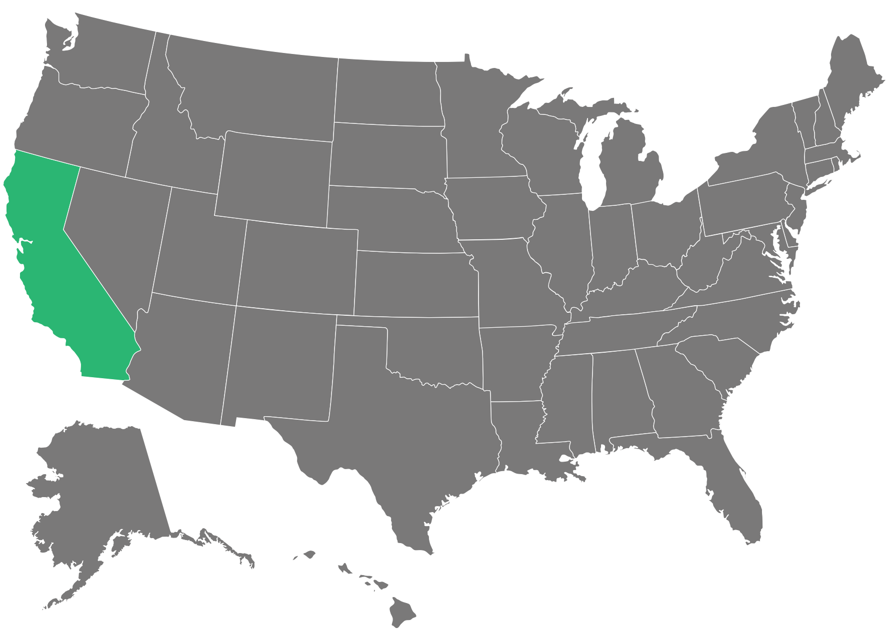
[Quarterly Update: June 2018]

[Around the Firm It has been an eventful start to the year at Integrity. In February, Kristofer Gray (Principal and..]

LOCATION

Our Locations

With offices on both coasts and the midwest, as well as a geographic footprint that expands well beyond our brick and mortar locations, we are well positioned to service clients from anywhere in the country.



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SCHEDULE MEETING

About Our Team Client Portal Contact Us

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