



One Team. One Focus.

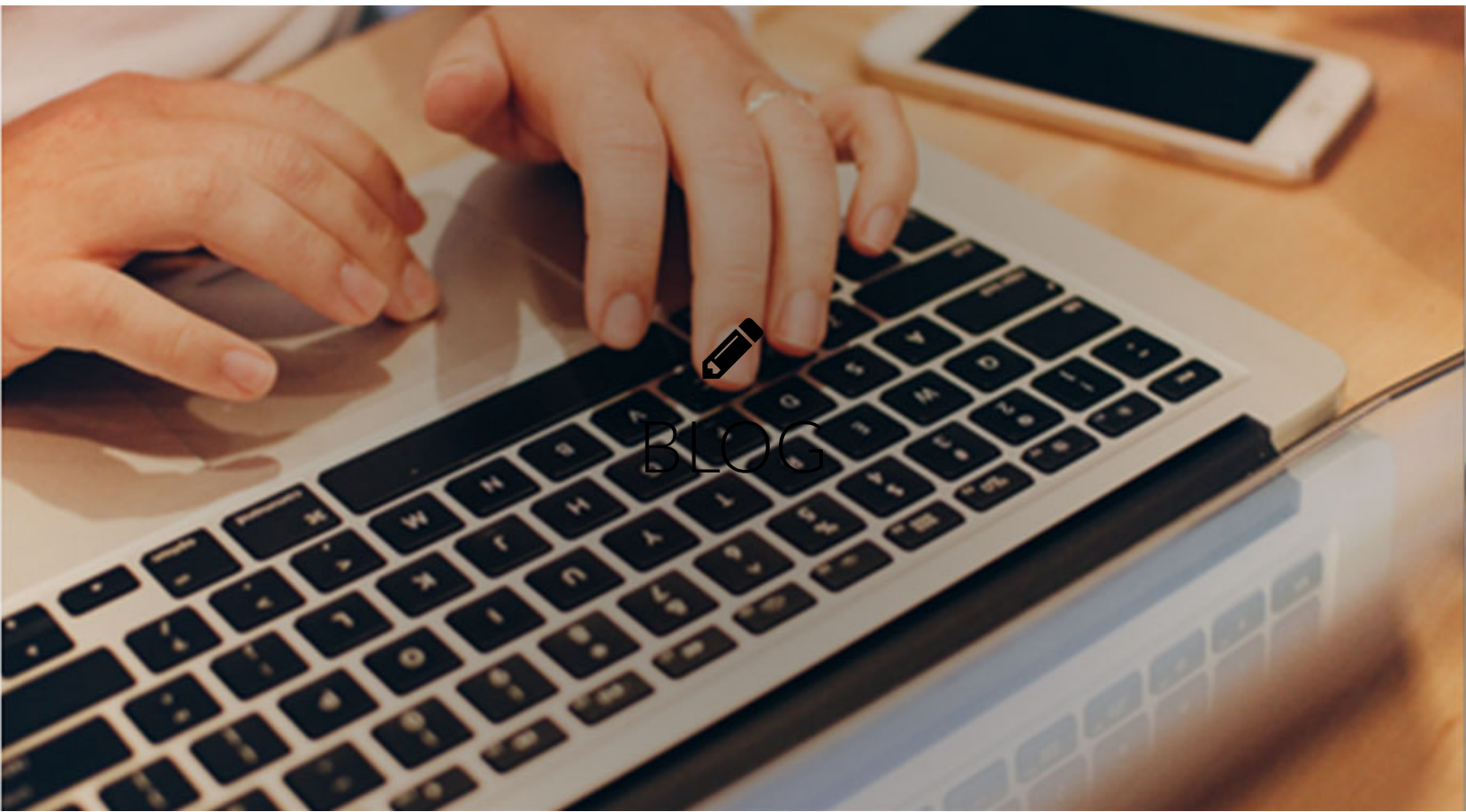


WHAT WE DO

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(/team)



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WHO WE ARE

CollaborativeWEALTH® is a financial planning and integrated wealth management firm headquartered in Lake Mary, Fla. Our team of professionals possess an in-depth knowledge of financial services, investments, employee benefit plans, insurance, and other tools necessary to help build an effective financial foundation for you, your family, or business. Our mission is to help you discover how your goals, dreams, and financial life are intertwined and inseparable, and then help you take the necessary steps to pursue what is truly important. We deliver this through a commitment to comprehensive financial planning and investment advice, wealth management, personalized client service, and objective asset management. Essential in this process is the guidance of a trusted advisor demonstrating the highest level of integrity and commitment to your success. As a fee-based firm, we offer no proprietary or “house” products allowing us to provide objective financial advice tailored to your particular situation.

Talk to a representative today about our services that we offer and perform.

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