Wealth Management Services

Wealth management services include innovative strategies, efficient implementation, and superior service

Our group of experienced financial professionals operates with the technology and resources of a well-established financial services company—coupled with a commitment to personal attention and superior service every step of the way. Our disciplined, integrated approach creates a proven framework to successfully address your financial objectives.

What Clients Can Expect From Us

We use our extensive experience to skillfully assist you in turning your vision for wealth accumulation and preservation into reality. This includes analyzing and reviewing your needs on an ongoing basis. You can expect a real commitment to help simplify, consolidate, integrate, and control every aspect of your current and future financial matters. We free you from the day-to-day concerns of managing and protecting your wealth so that you can devote more time to your business, your personal endeavors, and your family.

Services & Benefits

Imagine a single source through which you can manage all of your financial matters—your assets, financial and estate plan, insurance, and your retirement and cash flow models. We give you that ability by organizing, consolidating, and integrating your finances:

- Financial goals/plans
- Cash flow/retirement models
- Balance sheet/net worth statements
- Insurance coverages and summary
- Asset allocation strategy
- Estate plan strategy

Our Wealth Management Services Include:

- Immediate access to all financial-related matters in a single location
- Your assets are always current and balance sheets are updated daily
- Your updated financial status is automatically integrated into your comprehensive financial and estate plans, providing you with a meaningful, up-to-date analysis

You Can Count On Us To:

- Maintain a high degree of communication and personal service
- Respond quickly to your requests
- Assist you in keeping your financial goals on target as changes in your life circumstances, business, or regulations/tax policies occur
- Respect your privacy. Above all, we value your trust and keep all information that we collect strictly confidential.

Value Added Advantages

We stay up-to-date with the latest knowledge and tools in the field to give you exceptional value. Our wealth management services also offer these advantages:

Financial Needs Analysis

This analysis allows our clients to efficiently obtain a comprehensive strategy for addressing short- and long-term financial needs.

E-Money

This powerful management tool provides an online "safety deposit box" for important papers and records. Clients can use our secure, encrypted Advisor Platform™ Vault to store all types of legal documents, medical records, insurance policies, photos that are irreplaceable, videos and audio files, etc. The information is easily accessible anytime through the Internet.

Estate/Wealth Management Support

Our financial professionals assist you in various ways, such as assembling a unique document that contains vital information, organized in one place, which helps your family take care of important decisions in case of your sudden incapacitation or death. This document is an important gift to one's family, designed to leave a lasting legacy.

Estate & Life Planning Strategies • Employee Benefits Planning • Wealth Management & Financial Strategies
4000 Smith Road, Suite 300, Cincinnati, Ohio 45209 • midwestfp.com

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