



IPI Wealth Management, Inc.

Strategic Lifestyle and Wealth Management™

The Value of Advice

Partnering for Success with

Investment Management

- **Suitability**
 - Risk tolerance
 - Financial needs vs. capacity
- Investment Policy Statement
- Hub (Core) and spoke (Tactical) philosophy
- **Security selection**
 - Independent selection
 - No proprietary products
 - Multiple institutional research sources
 - Proprietary investment selection process
 - Expense awareness and comparisons
- **Portfolio construction**
 - Multiple independent sources of economic outlooks and analysis
 - Experience through a variety of market cycles
 - Cash distribution management
 - Patience
- **Monitoring and rebalancing**
 - Facilitates potential improvement of returns and reducing market cycle risks

Wealth Management

- **Our process... Strategic Lifestyle and Wealth Management™**
 - Clarification of goals and objectives
 - Analysis
 - Financial planning assumptions
 - Investments
 - Recommendations
 - Implementation
 - Monitoring and updates
- **Financial Planning**
 - You
 - Your business(es)
 - Your family
 - Define significance... what do you want to achieve?
 - Now
 - Three years
 - Beyond
- Personal financial planning simulation
 - What if scenarios to test goals and scenarios
 - Monte Carlo analysis to test multiple investment outcomes
- Consistent communication
- Caring + trust = peace of mind
- Free up your time and energy
- **Tax management**
 - Constant awareness
 - Asset location strategies
 - Integration with entire team of advisors
 - Call in outside resources as needed

Concierge Services

- Next generation success
 - You and your business and family
 - Our team who serves you
- Philanthropic planning
- Risk management services
 - Long term care considerations
 - Life and disability insurance considerations
- Social security claiming strategies
- Assistance with book keeping strategies