IPI Wealth Management, Inc.

Strategic Lifestyle and Wealth Management™

The Value of Advice

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