



# CREATIVE PLANNING

Since 1983, Creative Planning has operated as a fiduciary, putting clients' needs first.

## Who We Are:

We are a financial planning firm that has been in business over thirty years. Our mission is to provide our clients with clarity, to educate, and to make significant tangible progress towards their financial goals. Investment management is the core of our services.

## What You Have Access To:

- ◆ As our client you will have access to our investment committee that focuses on cost-effective, after-tax results. Our committee focuses on searching for and utilizing the 'best in-class' investment vehicles for every component of our clients portfolio.
- ◆ We employ the highest standard of care when it comes to advising clients on their money. We have been a fiduciary for over thirty years, focusing on you and your needs is our main priority.
- ◆ At Creative Planning you will have a dedicated advisory team that will include:
  - ◇ Certified Financial Planner (CFP)
  - ◇ Certified Public Accountant (CPA)
  - ◇ Estate Planning Attorney
  - ◇ Operations Manger
  - ◇ Investment Manager
- ◆ We know you may have additional needs, which is why we also offer the following services, allowing us to meet each clients unique needs.
  - ◇ Tax Services
  - ◇ Institutional Services
  - ◇ Estate Planning and Asset Management
  - ◇ Financial Planning
  - ◇ Risk Management
  - ◇ Retirement Plans

## National Recognition:

- ◆ #1 Independent Wealth Management Firm in the United States by CNBC<sup>1</sup>
- ◆ #1 RIA - Forbes<sup>2</sup>
- ◆ #1 Independent Wealth Management Firm in the United States by Barron's<sup>3</sup>

## Contact Us:

### Email us:

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### Visit us online:

[www.creativeplanning.com](http://www.creativeplanning.com)

### Call us:

866.909.5418

1. "CNBC charts the Top 100 fee-only wealth management firms." CNBC. CNBC LLC, 14 May 2014. Web. 03 June 2015.

2. "100 Fastest Growing RIA Firms." Forbes.com. Forbes.com LLC, n.d. Web. 14 November 2016.

3. Barron's: Independent Advisors: 2017's Top 100.; Barron's. Dow Jones & Company, Inc., n.d. Web. 15 September 2017.

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