INFINITE **INTEGRATED WEALTH PLANNING**

The goal isn’t more money.
The goal is living life on your terms.

– Will Rogers

WE DON'T MAKE PLANS, WE MAKE TIME FOR THEM.

The monumental shift from a culture that once lived to work, and now works to live has had a tremendous impact on the Wealth Planning landscape. In a new world where people continue working well into retirement simply because they love what they do, but consistently maintain focus on a healthy work/life balance as a priority - time has become our most valuable resource.

Your wealth is more than money. While each of us is unique, we all have this in common - we can make more money; we can't make more time. Our connection to our clients and integrated teams gives us clarity and insight into not only what you want to achieve, but how you want to get there.

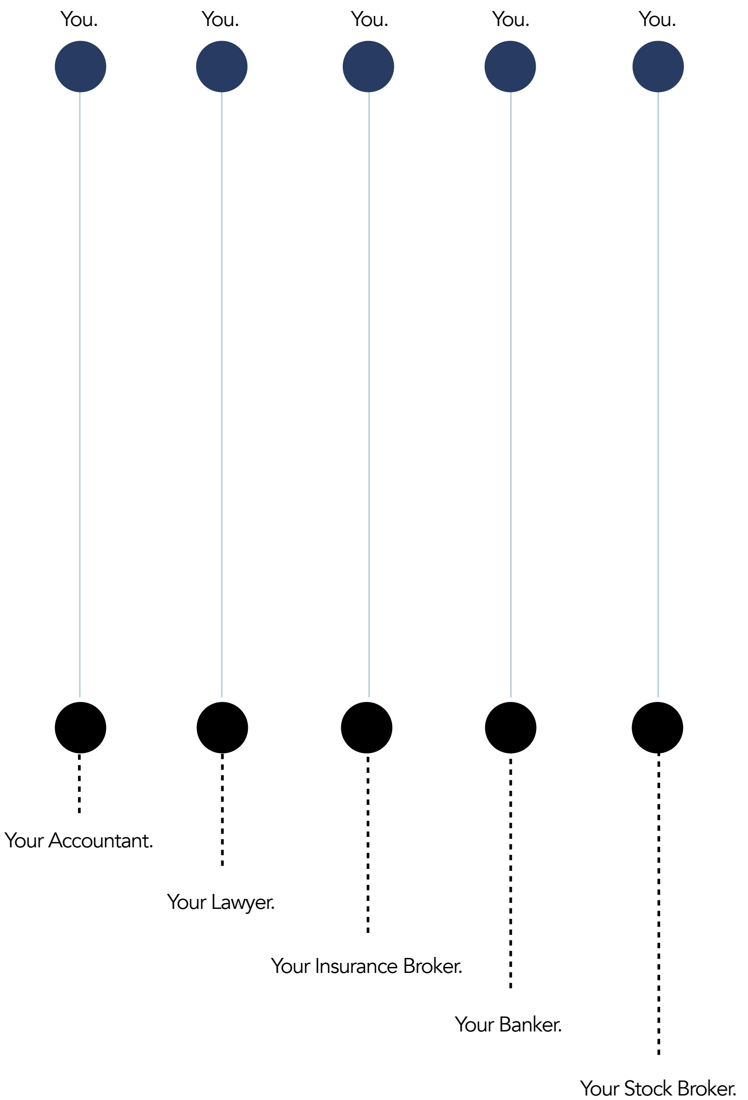
Life is a journey, not a race to the finish.

Infinite Wealth Planning

WE SEEK TO
EXPLORE, INITIATE, NURTURE, IMPLEMENT &
EMBRACE CHANGE

At Infinite, our commitment to continuously improving the experience our clients and community have with our firm is what sets us apart in our industry. The ability to listen and respond to the changing needs of our clients has led to our shared successes. It is the reason we have made the decision to elevate our practice again with the introduction of Integrated Wealth Planning.

Integrated Wealth Planning is a simplified solution that helps you reach your goals and objectives. It creates a centralized connection to your professional advisors, while removing communication barriers that can cost you time and money.

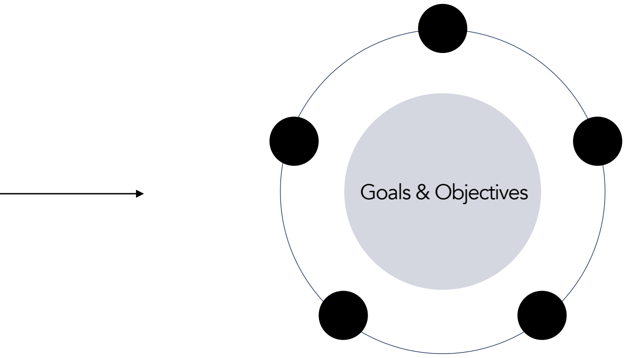


SOMEWHERE ALONG THE LINE, THINGS GOT COMPLICATED.

As you've evolved, so has your need for professional advisory. From your first job, to your first home - your professional advisory team is necessary for you to continue to grow.

Although each professional advisor brings expertise and a unique perspective, there is seldom a clear vision of your overall goals and objectives due to the lack of transparency as a team. When you are the only point of contact acting as a project manager between your professional advisors, it can lead to missed opportunities and lack long-term focus.

INTEGRATED WEALTH PLANNING
SIMPLIFIED, CENTRALIZED, CONNECTION.



INTEGRATED WEALTH PLANNING BETTER SERVES YOUR NEEDS TODAY, THROUGH A BETTER UNDERSTANDING OF WHERE YOU WANT TO BE TOMORROW.

The core focus of the design is to integrate the areas of: Accounting, Tax, Financial Planning, Investing and Insurance. It is built on establishing clarity, delivering insight, and executing strategies, in partnership with an integrated team of highly skilled professional advisors.

INTEGRATED WEALTH PLANNING EXPERIENCE

Integrated Wealth Planning is simplifying the complex needs of successful clients by developing, implementing, and realizing their goals and objectives for the future.

CLARITY

Who are you today, and where do you see yourself tomorrow?

At the beginning, our purpose is to create clarity and perspective around your unique goals, relationships, values and needs. Questions will focus on your dangers, opportunities, strengths and vision for the future.

INSIGHT

What are the insights gained from the Clarity stage?

Knowledge and insights gained from the Clarity stage will be shared with you and will focus on how the Integrated Wealth Planning model can be realized and will add value, as opposed to the traditional approach.

PARTNERSHIP

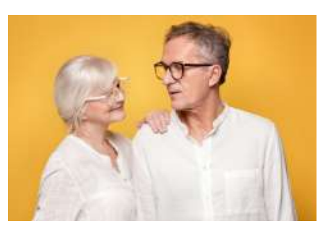
Where do we go from here?

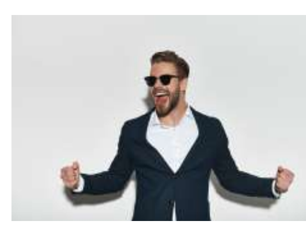
The purpose at this stage in the process is creating clarity of roles and responsibilities for you as a client, and for each member of your Integrated Wealth Planning Network. This sets the stage for building a long-term, mutually-beneficial partnership.

PULSE

When and how does your team communicate with you?

We believe that regular contact enhances our team's ability to stay connected with our clients in order to accomplish their goals and objectives. Your Integrated Wealth Planning Network will design a communication and service schedule to meet your needs, and ensure alignment with your vision for the future.





INTEGRATED WEALTH PLANNING ENSURES YOU ARE MAKING THE BEST USE OF THE TIME YOU HAVE, TO SPEND TIME ENJOYING THE LIFE YOU HAVE EARNED.

CLARITY

INSIGHT

PARTNERSHIP

PULSE

CLIENT EXPERIENCE

Integrated Wealth Planning is what makes Infinite stand out in an industry that has forgotten the value of connection. It is a commitment to the goals and objectives of our clients, and a dedication to build the foundation of what is to come next.

INTEGRATED
GOALS & OBJECTIVES

Wealth Planning serves real people; at its core it is an alignment of 'head and heart'. Our clients are successful families, businesses, charities and more - defined by the ambitions and values that led them on the path to the life they have worked hard to build.

Our approach to Wealth Planning is to gain clarity and insight into the goals and objectives of our clients, and build long-term plans that incorporate the ambitions and values that have been the foundation of their success.

INVESTMENT
GOALS & OBJECTIVES

DIVERSIFIED INVESTMENT STRATEGIES THAT TRANSFORM TRADITIONAL INVESTMENT PERSPECTIVES

Integrated Wealth Planning enhances collaboration and opens doors to opportunities once out of reach to traditional retail investors. With a focus on extensive diversification strategies, low volatility, capital preservation, and cash flow, our decision to partner with WealthCo Asset Management has created innovative investment opportunities and increased the value we deliver to our clients at Infinite Wealth Planning.

Inspired by the work done in many leading pension funds and endowments, WealthCo Asset Management offers portfolios rich in allocations to less correlated alternative asset classes such as real estate, private equity, hedge funds, private mortgages and debt. Their size and scale gives them access to exclusive investment managers, larger real estate and private equity deals, preferential rates, and lower costs.

In addition to greater access, WealthCo Asset Management has adopted a fee-based investment model that along with the fiduciary responsibility of the portfolio managers, ensures that the best interest of Infinite Wealth Planning clients is at the forefront by removing traditional commission-based investing.

The stability WealthCo Asset Management provides is rooted in philosophy, dedication, and a commitment to work within an integrated advisory network through long-term investment strategies that reflect the goals and objectives of clients.

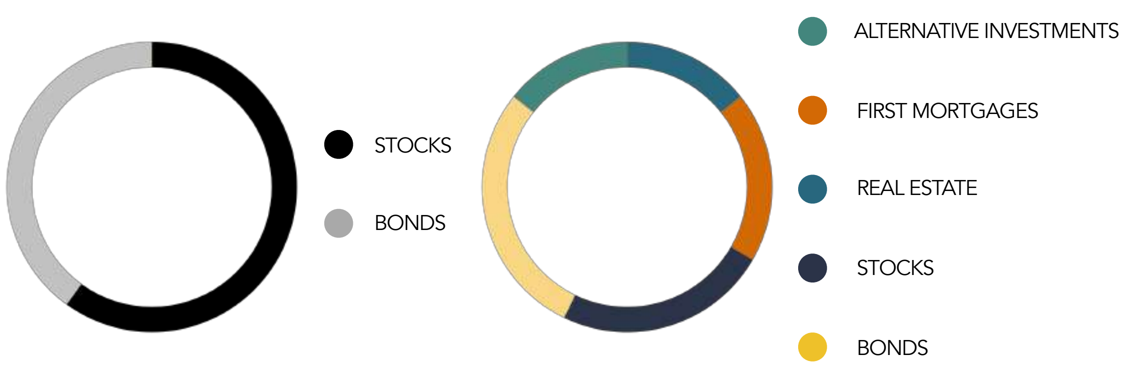
INVESTMENT
GOALS & OBJECTIVES

DIVERSIFICATION STRATEGIES
LOW VOLATILITY
CAPITAL PRESERVATION
CASH FLOW

WEALTHCO BUILDS DIVERSE INVESTMENT STRATEGIES THAT TAKE CLIENTS BEYOND THE 60/40 TRADITIONAL WEALTH MANAGEMENT PERSPECTIVE

Advocating and implementing authentic diversification models allows our clients greater insulation from market volatility through long-term strategies for you based on personal needs, aspirations, investment timelines and your vision for the future.

WHICH PORTFOLIO DO YOU OWN?



INSURANCE
GOALS & OBJECTIVES

STOP BUYING INSURANCE FOR IMPACT,
AND START USING INSURANCE FOR OPPORTUNITY.

Integrated Wealth Planning incorporates the risks that you, your family, and your business face through tailored insurance strategies. Making smart financial decisions does not begin and end with your investment portfolio; insurance is an integral component of a strong financial plan.

Insurance solutions play a pivotal role in the success or failure of Integrated Wealth Planning. They expose opportunities that can be leveraged to achieve your long-term goals and objectives and deliver immediate benefits of increased diversification within your portfolio.

Insight into the potential risk you face allows your integrated network to uncover aspects of your life where insurance strategies can turn weakness into opportunity. Although the topic of insurance can be difficult, there are risks that you, your family, and your business face that can impede or destroy the long-term goals and objectives you have set.

Infinite Wealth Planning has partnered with WealthCo Insurance to provide the opportunity for our clients to benefit from the confidence that insurance is designed to deliver, while creating value from strategies customized to client goals and objectives.

INSURANCE NEEDS EVOLVE WITH YOU, AND SO DO THE PRODUCTS AND STRATEGIES THAT CREATE OPPORTUNITY.

IS YOUR CURRENT INSURANCE STRATEGY MEETING YOUR NEEDS TODAY?

INSIGHT INTO THE POTENTIAL RISK YOU FACE PERSONALLY AND PROFESSIONALLY ALLOWS YOUR INTEGRATED NETWORK TO TURN WEAKNESS INTO OPPORTUNITY.

GREAT MINDS THINK ALIKE.

INTEGRATED WEALTH PLANNING. CONNECTING THE PEOPLE YOU COUNT ON.

Our strategy with the implementation of Wealth Planning is the product of over a century of accumulated experiences in Accounting and Wealth Management.

At Infinite, we recognized the evolving needs of our clients and made the decision to partner with WealthCo to increase value and new opportunities. Adapting to an ever-changing industry with the strength and knowledge of specialized professional teams is our future in focus.

Every trusted relationship starts somewhere; ours starts with your story.

HOW DO YOU INVEST YOUR TIME?

WE INVEST OUR TIME IN THE GOALS AND OBJECTIVES OUR CLIENTS HAVE FOR THEIR FUTURE.

Book a free consultation with a Wealth Planner to see
your future in focus through Integrated Wealth Planning.

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INFINITE

Wealth Planning

INFINITE Wealth Planning is dedicated to giving our clients outstanding advice and full access to our highly trained team. We pride ourselves in having a low turnover of staff and satisfied clients over the last 20 years.

Our firm now consists of three partners and 13 highly trained staff who have an excellent reputation and a wealth of knowledge and experience. Your mind will be at ease knowing that your affairs are being professionally managed and that you are receiving the most tax advantageous planning available.

WealthCo.

A FOCUS ON SHARED VALUE.

At WealthCo we believe the greatest return on investment is human capital. The value we bring our clients, partners and people is a commitment to deliver trusted unbiased solutions to challenges in meeting financial goals and objectives. The value we receive in return is the ability to grow our company, people, culture, process and core values in an industry we are truly passionate about.

A UNIQUE PERSPECTIVE ON PHILOSOPHY

From the beginning WealthCo established ourselves as industry leaders by becoming early adopters of true authentic diversification. Traditionally, authentic diversification was only available to institutions and ultra high net worth investors, but our perspective on shared value gave us the courage that we needed to break down traditional barriers in our industry, and deliver an equally beneficial investment philosophy to our partners and clients.