



Simplifying the complexities of wealth.

simplify

COMPREHENSIVE WEALTH MANAGEMENT

A PROVEN PROCESS FOR YOUR LONG-TERM

a proven

1

Right Fit Meeting

We discuss your expectations and values, and consider the big picture. If we're a great fit, we move on to assess your goals.

2

Values & Goals Assessment

The White Oaks team works with you to clarify your tolerance for risk and identify the goals to be accomplished.

3

Strategy Development

We then consider portfolio construction, make recommendations, develop a plan of action, and begin reviewing progress toward your goals.

Our clients are busy and they rely on us to simplify the complex details of wealth management. Creating and executing the most effective financial management strategies takes time and experience. White Oaks handles the details, so you can focus on the things you care about most.

simplifying your life

SUCCESS

in process

4

The White Oaks Wealth Continuum™

The White Oaks Wealth Continuum responds to the evolution of your needs and constantly refines strategies to enhance your financial well-being.

We simplify the complexities of wealth. We've developed a one-of-a-kind approach that begins with your values and moves through a continuous cycle of assessment, management and communication. You can depend on us to keep your goals and priorities front and center.



SIMPLIFY YOUR LIFE

For more information or to set up a Right Fit meeting, please contact us to schedule a no-obligation conference. Call White Oaks at 800.596.3579 or 612.455.6900

Simplifying the Complexities of Wealth

White Oaks Wealth Advisors, Inc.
Minneapolis, MN

www.whiteoakswealth.com

Working exclusively for your success, we're a small firm with a big reputation priding ourselves in:

- ▶ A team approach
- ▶ Expertise in investment market analysis, wealth transfer techniques, stock option strategies, major trusts, asset management
- ▶ Top 150 Advisors for *Doctors, Medical Economics*
- ▶ Top 100 Advisors, *Mutual Funds* magazine
- ▶ *Worth* magazine's "Top 250 Financial Advisors"
- ▶ *Bloomberg's Wealth Manager* "Top 150 Financial Advisory Firms"

White Oaks Wealth Advisors offers independent wealth management services:

- ▶ Trust services
- ▶ Wealth transfer
- ▶ Portfolio management
- ▶ Asset protection strategies
- ▶ Tax planning
- ▶ Insurance risk management
- ▶ Financial independence
- ▶ Option strategies
- ▶ Unique Investment Opportunities
- ▶ Private Banking
- ▶ Financial Dashboard