



INDEPENDENT WEALTH MANAGEMENT

**Managing complexity,
delivering simplicity.**

stratwealth.com

Our Story

Strategic Wealth Partners (“SWP”) is an independently managed wealth management firm that has been partnering with clients since 2008. We created SWP because we saw an opportunity to provide more personalized solutions to clients in an environment that put their interests first.

In May 2024, SWP joined Kovitz Investment Group Partners, LLC, who is fully owned by Focus Financial Partners. This partnership gives our clients additional service offerings and expertise.

What does the fiduciary standard mean to you?

Our fiduciary duty is at the core of SWP — the legal and ethical obligation to put your interests ahead of our own. Our fee structure also aligns with your best interests. We are paid directly by our clients and don’t receive commissions or other financial incentives for our work.



Strategic

We work proactively to identify and implement actions that will enhance your financial well-being.



Wealth

We help you manage, protect, and enjoy the resources that you have worked hard to acquire.



Partners

We work in a collaborative environment that draws upon multiple skillsets to help you achieve your goals.

Financial Planning

Financial planning is the process of creating a roadmap toward your long-term goals while managing your priorities, needs, and opportunities along the way. For us, financial planning is more than the creation of a document; it's an ongoing and evolving process that is customized for you. Fundamentally, we believe that your financial plan should drive your investment decisions.

Our work begins by asking questions, such as: What milestones are on your horizon? What are your short-term objectives? What are your long-term goals? What does a meaningful legacy look like to you?

Once we learn more about you, our planning process covers the six key pieces of your financial life.

1



**Cash Flow
Planning**

2



**Investment
Planning**

3



**Retirement
Planning**

4



**Tax
Planning**

5



**Estate
planning**

6



**Insurance
Planning**

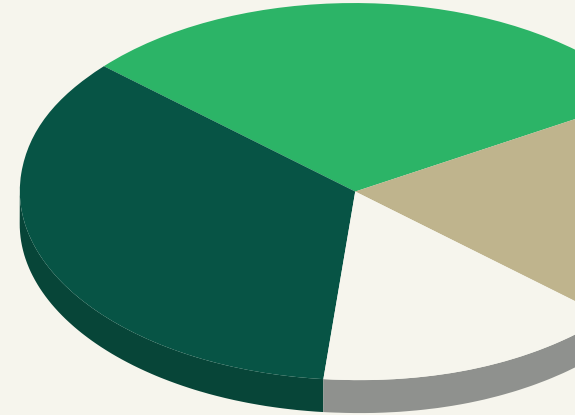
Investment Management

We invest our time and energy into developing the right portfolio for your short-term objectives, long-term goals, and risk tolerance. Our approach is rooted in the belief that asset allocation is an important determinant of investment success over the long run. For this reason, we don't view "market timing" as a viable strategy, and we rarely recommend individual stocks or bonds.

We are paid by clients directly. We do not receive commissions or other financial incentives for the investment advisory services that we provide.

This model allows our team to provide advice that is unbiased, objective, and driven by your goals.

**Asset allocation to
prudently grow
your wealth**



Who We Serve

Our work on behalf of clients is far-reaching, but it all comes down to managing complexity, delivering simplicity, and helping people reach their goals. Over the years, we've found that our team is especially well suited at serving eight distinct types of clientele, shown below. If one of these sounds like you, it's likely that our team would be a good fit to support your financial objectives.



Retirees



Professionals



Multi-Generational
Families



Business Owners



Surviving
Spouses &
Divorcees



LBGTQ+



Corporate
Executives



Retirement Plan
Sponsors



Your Trusted Advisors for Life

What can you expect when working with SWP? The answer is in our name: you can expect a partner who understands your life and the financial complexities that come with it. This level of understanding allows us to serve as trusted advisors for life, helping you manage every financial decision you will face.

In any partnership, good communication is critical for success. As we begin our work together, this communication starts with our team asking a lot of questions and doing a lot of listening. Through this process, we get to know you, your life, your priorities, and your goals — all information that serves as the foundation of our relationship moving forward.

As we begin working together, we tailor the experience to your unique goals, discuss what options exist, and look for other ways to support your financial wellbeing.

Service Meets Scale

Over the years, we've built an operational platform that includes many names you are probably already familiar with: Fidelity, Charles Schwab, and eMoney, to name a few. As an independently managed wealth management firm, we have the power to pick and choose the platforms and technologies that we leverage, helping us remain at the cutting edge when it comes to research, financial planning, and investment management.

Significantly, our relationship with Focus Financial Partners allows us to compete with any wealth management firm – large or small. Focus is a leading partnership of independent, fiduciary wealth management firms that provides superior access to best practices, resources, and continuity planning for partner firms.

This means that when you work with our team, you tap into a vast network of knowledge, skills, and experience that can help you navigate unique planning and investment challenges.



We look forward to hearing from you.

Connect with our team in Deerfield or Milwaukee,
or visit us online to get the conversation started.



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Brokerage commissions and/or transaction fees charged by broker/dealers are exclusive of and in addition to our Management fee. External Managers may purchase or sell securities through a broker/dealer other than the Custodian(s) (trade away). Managers of Fixed Income Securities, which are traded exclusively through dealers, may trade away on a frequent basis. Your account may incur higher transaction costs for securities traded away than those traded through the Custodian(s). Please read the disclosure brochure for each External Manager carefully.

For additional information about SWP, including fees and services, send for Kovitz's Disclosure Brochure. Please read the Disclosure Brochure carefully before you invest or send money.