



WEALTH MANAGEMENT SERVICES

Grow, Preserve & Protect Your Wealth

Your financial future deserves a plan. ELO Wealth Management provides personalized guidance designed to help you pursue your financial goals with confidence—from building wealth and preparing for retirement to creating a lasting legacy for future generations.

Through our partnership with RIA Advisory Group, we offer comprehensive wealth management solutions backed by experienced professionals who understand how your financial decisions impact your overall financial picture.

The ELO Difference

Many financial advisors focus solely on investments. At ELO, we take a broader view. Our Wealth Management team works alongside our tax professionals to help align investment decisions with tax strategies whenever possible. By considering both, we can help identify opportunities to reduce tax exposure and keep more of what you've earned.

- ✓ Personalized financial planning
- ✓ Investment management aligned with your goals
- ✓ Tax-aware wealth strategies
- ✓ Retirement and estate planning guidance
- ✓ Local advisors backed by specialized expertise

Asset Management

- Custom Portfolio Management
- Separately Managed Accounts
- Retirement Planning
- Estate Planning Coordination
- Insurance Planning
- Small Business 401(k) Plans
- Solo (k), SEP & SIMPLE Plans
- Traditional IRA & Roth IRA Planning
- 529 Education Savings Plans

Advisory & Brokerage Services

- Individual Securities
- Exchange-Traded Funds (ETFs)
- Mutual Funds
- CDs & Bonds
- Low-Cost Variable Annuities

Start Planning for Tomorrow, Today

Whether you are preparing for retirement, growing your investments, or looking for strategies to help minimize taxes, ELO Wealth Management can help you create a plan tailored to your goals.

TALK TO AN EXPERT at ELO CPAs & Advisors Today!

605-996-7717

elocpa.com