LEXUS
WEALTH
MANAGEMENT

Wealth Management Solutions

Quality of Life, Matters

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Financial decisions are typically made to enhance or preserve a standard of living.

Lexus Wealth Management believes that every financial decision should find a place in the composition of your quality of life. These decisions are the difference in whether your financial goals and objectives are achieved.

Our process relies on gaining an understanding of your needs and your situation. Then utilizing financial planning strategies and composing actively managed portfolios of low-cost investments that meet appropriate risk profiles. This process invokes a peace of mind that is an important part of our fiduciary responsibility and how we maintain long-term client relationships.

A Commitment to Quality

Better planning, strategies, investments, processes, and services. Our commitment to continuous improvement is what is expected of Lexus Wealth Advisors. We plan our business objectives on delivering on this commitment.

Quality: *The Standard of Something as measured against other things of a similar kind; the degree of excellence of something.*

A Quality Retirement

The pleasure of retirement is being able to do what you want to do, when you want to do it. This doesn't ensure a gratifying retirement, but it goes a long way toward designing a retirement lifestyle that suits your most ambitious objectives.

Lexus Wealth Management Advisors can ask and answer questions to help you bridge the gap between accumulating assets before retirement and how you implement a retirement income plan in the future.

Our advisors understand that one size does not fit all, so we pride ourselves in acquiring knowledge in many areas of retirement expertise, to insure you are receiving the best advice for your situation.

Lexus Wealth Services – Who We Help

Our aim is to meet and exceed your expectations when it comes to developing strategies that allow you to achieve your most important goals.

You know what these goals are, and the common denominator in the application of a financial strategy is having enough money to accomplish it.

We rely on our experience and a commitment to utilize all available resources to implement strategies that seek to grow and preserve wealth.

Individuals

We agree the amount of information available about investment planning is vast. We help individuals cut through the minutia and utilize strategies that are focused on their unique objectives.

Business Owners

Business owners have a special perspective when it comes to strategies available to grow and preserve wealth, we understand the challenges and can help you implement solutions that meet the vision of the business owner.

Employers

We install and manage 401(k), 403(b), Cash Balance, Solo 401(k), SIMPLE and SEP Plans. Employee education is also offered.

Lexus Wealth Services – How We Help

Financial Planning

Every service we provide starts with gaining an understanding of where you are, where you want to go, and the challenges we will encounter along the way. Financial Planning is our tool to manage the process.

Investment Management

Growing & Preserving Wealth requires us to understand your need for capital now and into the future. This is how we begin to manage your assets for growth and safeguarding.

Portfolio Management

We actively utilize a broad spectrum of asset classes that allow us to adjust to changing financial markets and economic conditions. We do this by managing model portfolios with the flexibility of our investors tolerance for risk, and necessity for growth or capital preservation.

Retirement Planning

For us, retirement planning is creating a retirement income stream that you will never outlive. We start this process the first day with each investor. The rest is planning a **Quality of Life, that Matters.**

Insurance & Protection Planning

The right amount and the right type of insurance is key to protecting the people, organizations, and things you care about. We support you in determining proper protection planning.

Estate & Legacy Planning

Estate & Legacy Planning is not just for your last day on earth. We work with you to ensure you have the documents and the wherewithal necessary to support your goals whether you live or die.

What We Believe In…

Every Investor has a shot at Financial Security – We've experienced this.

Wealth Planning has Foundational Principals – We apply them.

Investments should be monitored, evaluated and adjusted – We make tactical adjustments to your portfolio assets.

Clients should get more than they pay for – A fee-only advisor, we share a common goal with you, to grow your assets. Instead of commissions, our transparent fee-only money management ties our compensation directly to the performance of your account. Thus, we avoid conflicts of interest; we are on the same side as you.

A Relationship for Success

- Dedicated Wealth Advisor guiding Long Term Financial Planning Strategies
- Network of Partners to assist with Implementing Your Planning Strategies
- Financial Plans, Built to Address Your Unique Priorities
- Consistent Communication to Keep you Informed about Your Investment Portfolio and Planning Progress
- Comprehensive Disciplined Investment Strategies, based on Fundamental, Technical, and Modern Portfolio Theory
- Portfolio Security, without High Cost
    - Lexus Wealth Management utilizes portfolio strategies without sacrificing your objectives due to high cost, inflexibility, high commission, high surrender fees, and the misuse of certain investments.

Selecting Your Financial Partner

Choosing a firm to manage your family's wealth is an important decision, you deserve an objective analysis of your current situation.

Lexus Wealth Advisors, after gaining an understanding of your goals and the current management of your assets, will provide an objective evaluation and recommendation of how we can help.

No Cost, No Pressure and No Obligation.

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