Wealth Dimensions

Integrated Wealth Management
for Insight Beyond the Ordinary

It's All about You

Wealth Dimensions positions you at the controls of your financial success. Like many of our clients, your family is a priority, and Wealth Dimensions works to equip you for each and every milestone.

It begins with getting to know you. We draw on our years of experience to guide you through our **Dimensions of Wealth** process, which defines your personal and financial goals in terms of **Freedom**, **Security** and **Impact**. Using these integrated dimensions, we work with you to set priorities and provide you with the expertise and solutions that enable you to achieve what matters most.

Success is rarely achieved through luck or fate. Rather, it is the direct result of intentional actions that require diligence and discipline consistent with your desired outcome. As your partner, Wealth Dimensions seeks to understand not only what you want to achieve, but eliminates the uncertainty that keeps you up at night.

Through our integrated approach to planning, you are able to achieve optimal results that consider all issues impacted by your decisions. As a client, you receive customized, purpose-driven strategic plans that coordinate all aspects of your personal, financial, investment, tax, risk and estate planning. We then work to provide you with a clear understanding of the issues that impact your path to success. We take it personally because it is.

Our firm is built on our relationship with you—it's about responsibility and trust. Our services are provided on a fee basis, eliminating conflicts of interest inherent with most "financial advisors" and empowering us to provide you with personalized financial strategies. Our advice is solely based on your situation and needs, where you are today and where you want to be. We believe it's our fiduciary responsibility to you to operate independently without investment product affiliations or limitations.

A Foundation of Experience

Founded in 1986, Wealth Dimensions has helped foster a solid financial future for business owners, medical professionals and other affluent clients and their families. Together, our team of dedicated financial advisors has nearly 100 years of experience.

Wealth Dimensions was formed with a belief that you deserve objectivity and expertise that clearly identifies and explains the detailed steps to achieve your financial goals. Our investment advisors are Certified Financial Planners™ (CFP®), highly educated in all aspects of financial planning and trained to meet a fiduciary standard of care and diligence.

Our success has been built on exceptional professionals offering best-in-class service, combined with a commitment to remain independent and objective in meeting the needs of our clients, their families and future generations. It's the element of trust—the foundation of how we build relationships.

Achieve What Matters Most

Wealth Dimensions invites you to begin the process of building a clear path toward your financial goals. Schedule an introductory meeting with a financial advisor by calling **513-554-6000**, or visit our website at **www.wealthdimensions.com** to learn more about our full range of strategic financial planning services.

Setting the Standard

fiduciary

You may have heard the term, but what does it really mean? The word originates from Latin fides, meaning faith, and fiducia, meaning trust. So, a person in a fiduciary capacity is held to a high standard of honesty and full disclosure. It is someone who always acts in your best interest.