ENDOWMENT
WEALTH MANAGEMENT®

920.785.6010 • W6272 Communication Ct., Appleton, WI 54914

Experts in 401(k) Plan Management

Active Individual 401(k) Account Management

Holistic and Personalized Family Wealth Planning

Proactive Tax and Retirement Planning

Unlimited Access to CFP®, CFA, CAIA®, CPA, MBA, and AWMA® Professionals

Online Digital Wealth Portal with Vault for Important Documents

SCHEDULE YOUR FREE WEALTH CONSULTATION TODAY!

WHAT MAKES US DIFFERENT:

Our firm is an SEC Registered Investment Adviser (RIA).

We provide holistic "Fee-Only Fiduciary Advice" and retirement planning to our clients throughout the United States.

We utilize our 3-D Endowment Investment Philosophy® to guide our clients portfolios. (Learn below.)

Our professional team has over 125 years of experience and includes CPA's, CFP®, CFA® charterholders, MBA's, CAIA®, and AWMA® professionals.

Robert L. Riedl, CPA, CFP®, AWMA®, CFC™
President & CEO

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WEALTH MANAGEMENT®

Schedule your Free 401(k) Plan or Family Wealth Consultation.

Cell: **(920) 915-4000**

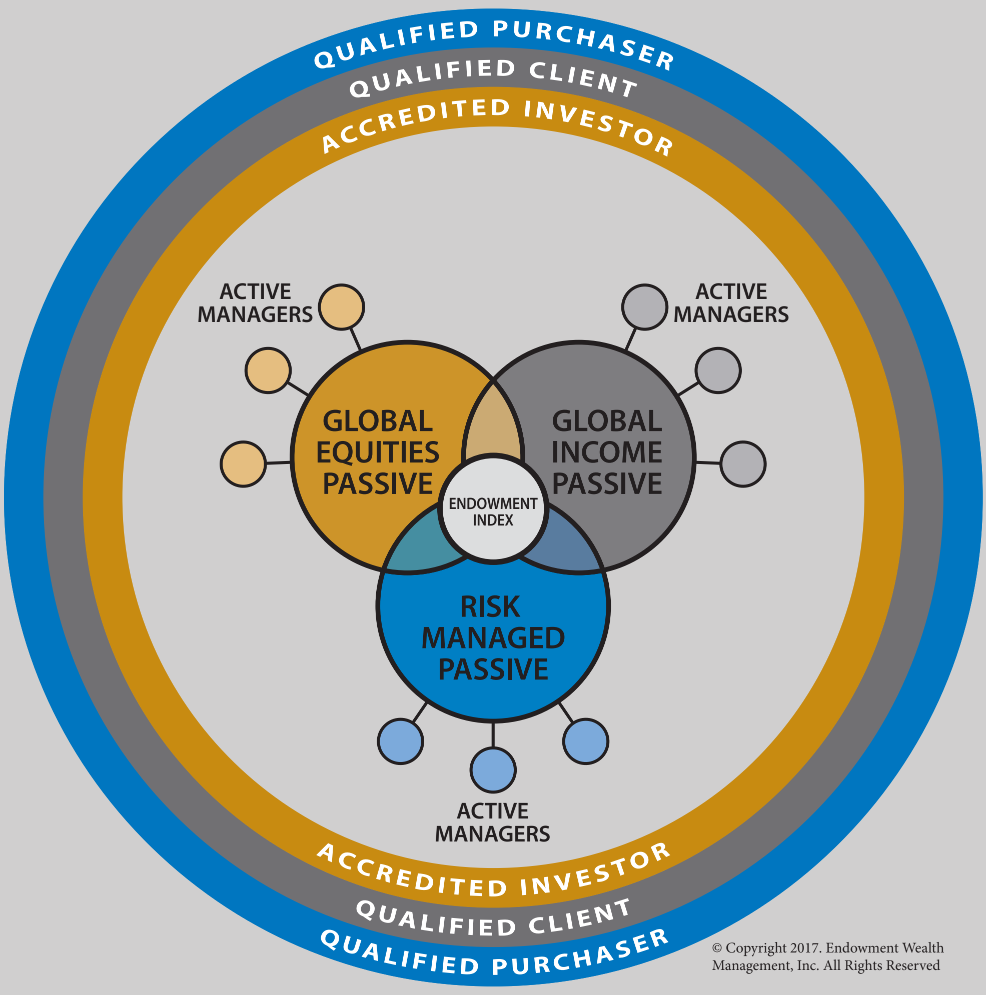
Email: **Rob@EndowmentWM.com**

Website: **www.EndowmentWM.com**

Our 3-D Endowment Investment Philosophy®

Where do traditional stock and bond portfolios invest when we are in a bear market with high interest rates?

Our 3-D Endowment Investment Philosophy® builds client portfolios based on the asset allocation of the top 800 universities with over $600 billion in assets under management. We provide three tiers of investments: passive ETFs, active managers, and illiquid alternative investments to strive for higher risk-adjusted returns for our accredited and qualified investors.



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