

# Our Expert Services



## Wealth Management

No matter what your level of wealth, working with PlanWise Financial Group can help you pursue your goals. Together, we'll go through a comprehensive process for managing your financial life and creating a long-term plan customized to your needs.

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## Why PlanWise

Regardless of their income level, everyone faces decisions regarding financial planning.

We are a boutique firm that focuses on providing the highest level of service to our clients. Our goal is to help simplify and enrich your life. We have extensive experience providing personal financial planning, business management, and tax services to high-net-worth individuals and their families, as well as to family businesses and foundations. We'll help you manage and preserve your wealth in accordance with your personal



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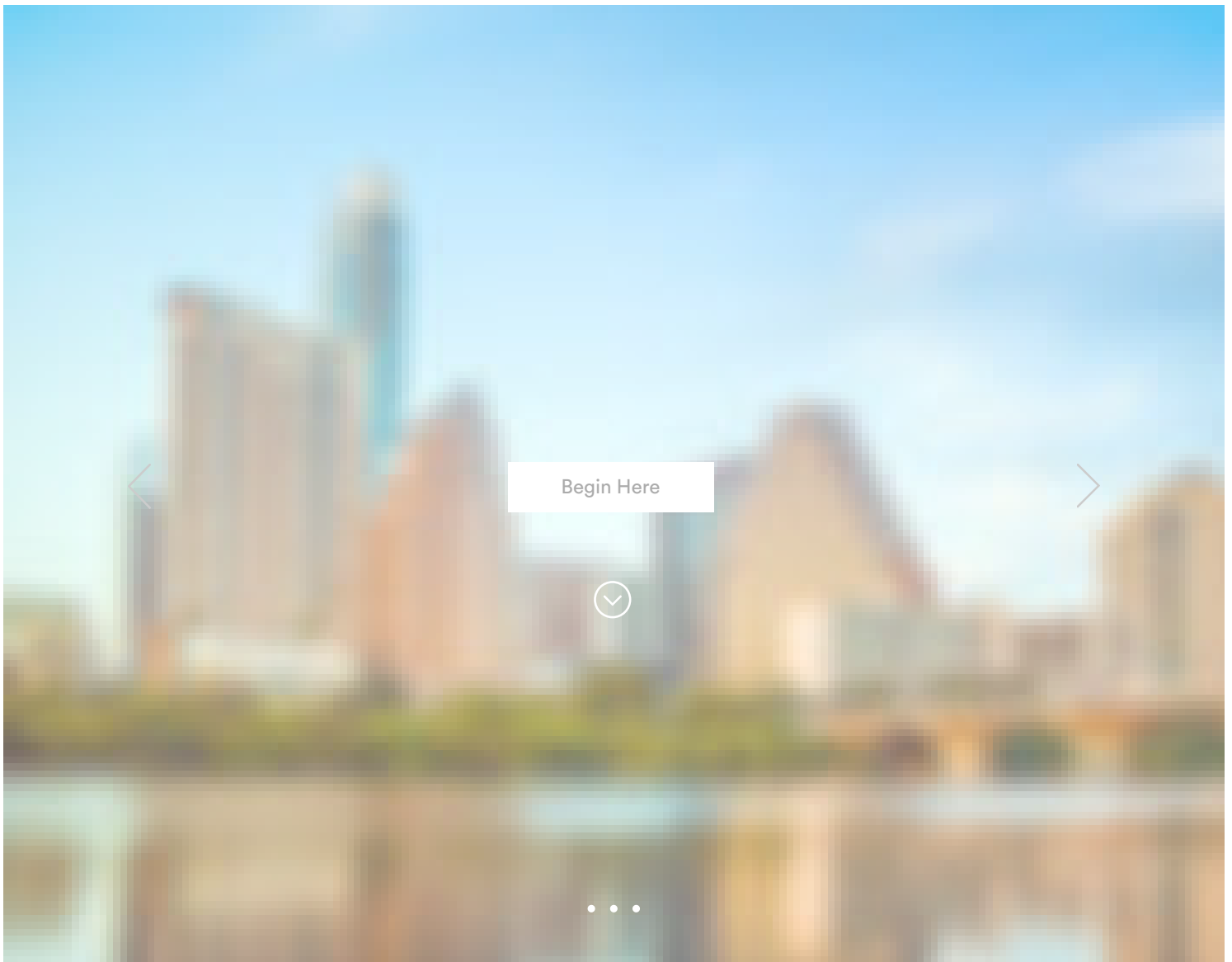
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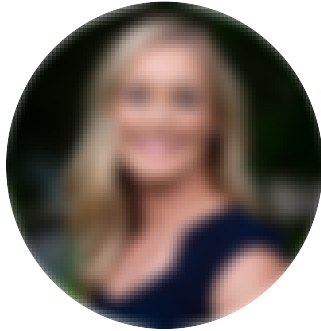
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our clients' expectations, earning us our reputation as a trusted partner. Our group provides concierge-style services so that our clients can rest easy with the knowledge that the complex details are in the hands of their trusted Advisors.

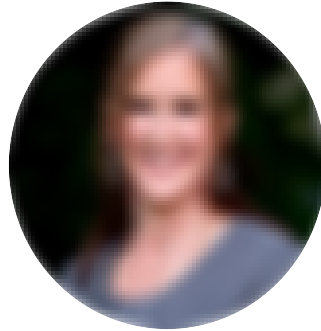
We are committed to you and your long-term financial success.





**Jessica Blood, CFP®**

Partner, Wealth Management Strategies



**Jennifer Cooper**

Client Service Manager



**Christopher Jones, AWMA®**

Partner, Wealth Management Strategies



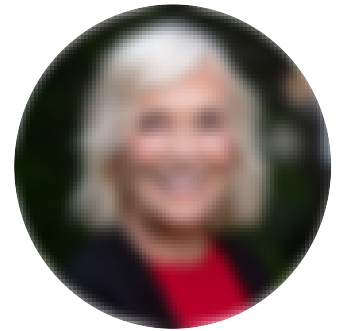
**John Blood, CFA®, CFP®**

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Financial Advisor, Wealth Management Strategies



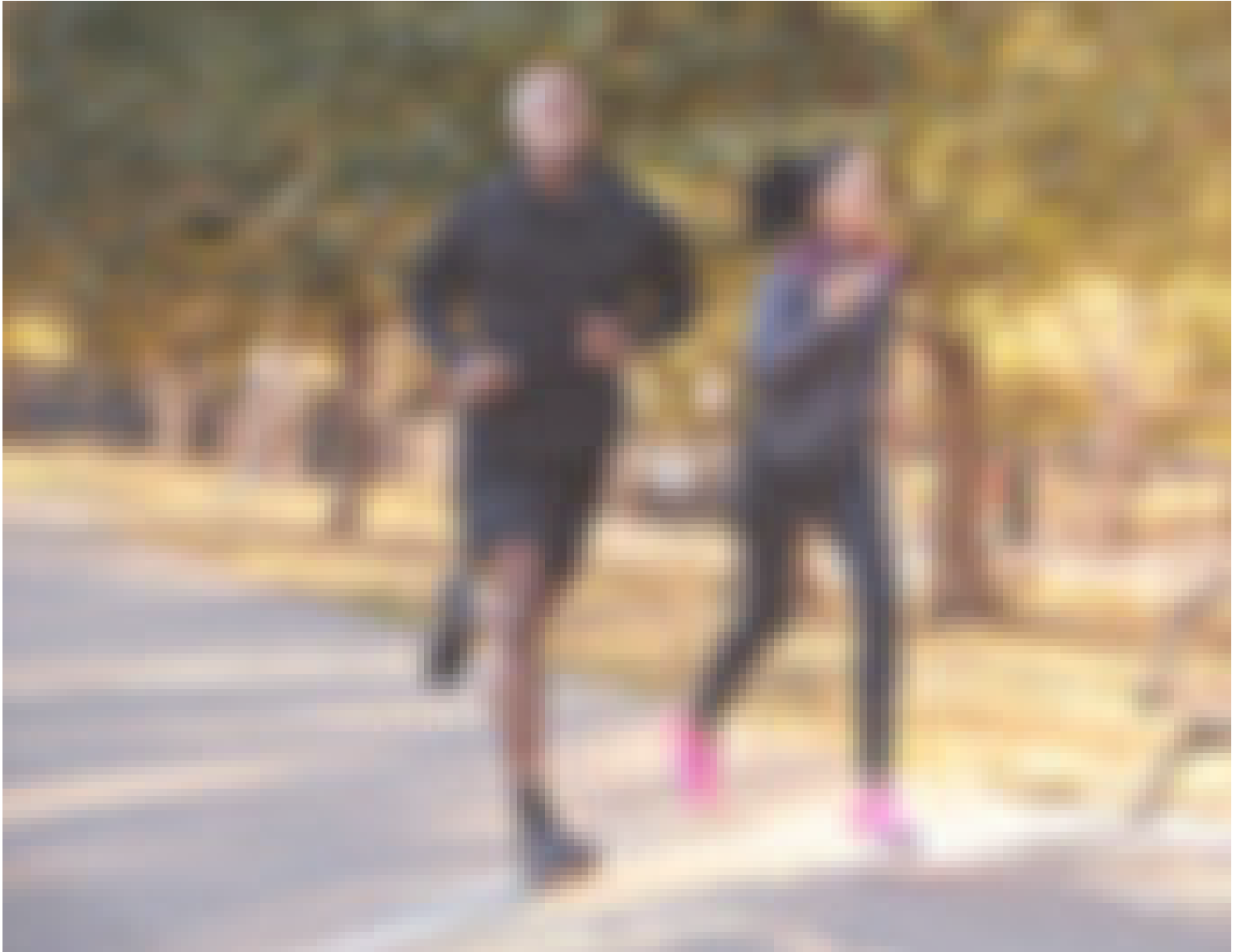


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