

HIGH-NET-WORTH WEALTH MANAGEMENT IN SOUTH CAROLINA

# More Wealth Creates More Choices. Better Navigation Creates Better Outcomes.

Your financial life has outgrown one-dimensional advice. WIN helps successful families, business owners, executives, and entrepreneurs coordinate investments, tax strategy, estate planning, risk management, and legacy around what matters most.

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Wealth Intelligently Navigated provides fiduciary wealth management for high-net-worth individuals and families in South Carolina and beyond. We integrate investment management with comprehensive financial planning to help clients preserve wealth, navigate complexity, identify opportunities, and build lasting multigenerational impact.

## OUR INTEGRATED WEALTH MANAGEMENT



### INVESTMENT MANAGEMENT

Personalized portfolios built around your objectives, risk tolerance, tax situation, liquidity needs, and long-term plan.



### TAX-AWARE STRATEGY

Proactive coordination designed to identify opportunities across investments, income, charitable giving, business interests, and wealth transfer.



### ESTATE & LEGACY PLANNING

Coordinate with attorneys and other professionals to help move your wealth moves according to your intentions.



### PRIVATE MARKETS & ALTERNATIVES

Where appropriate, evaluate opportunities beyond traditional public markets as part of a diversified wealth strategy.



### RISK & ASSET PROTECTION

Evaluate insurance, liquidity, concentration, business exposure, and other risks that can threaten accumulated wealth.



### FAMILY & MULTIGENERATIONAL PLANNING

Prepare not only the assets, but the people who will eventually inherit the responsibility that comes with them.

## One Financial Life. One Coordinated Strategy.

Complex wealth should  
not be managed in silos.



## WHY HIGH-NET-WORTH FAMILIES CHOOSE WIN



### FIDUCIARY BY DESIGN

We are a fee-only, SEC-registered RIA. Our advice is centered around your best interests—always.



### BOUTIQUE RELATIONSHIP

High-touch service and direct access to the people making decisions about your wealth.



### HUMAN-LED. AI-EMPOWERED.

Technology and data enhance decision-making without replacing judgment or relationships.



### THE WIN NETWORK

We coordinate across the professionals surrounding your wealth so the pieces work together.



### ALIGNMENT

Your investments serve your financial plan—not the other way around.

## The WIN Wealth Management Team

Every relationship is supported by a dedicated team working together for you.



### FOUNDER & WEALTH ADVISOR

Leads the relationship with overall stewardship of your financial life. Sets the vision, strategy, and long-term plan while ensuring a fiduciary standard in every decision.



### CO-ADVISOR

Partners with you on investment strategy, portfolio construction, and ongoing guidance. Provides additional perspective and seasoned experience.



### CERTIFIED FINANCIAL PLANNER™

Leads the financial planning process—cash flow, tax strategy, retirement, estate coordination, risk management, and goal achievement.



### CLIENT SERVICE DIRECTOR

Your central point of contact who ensures a seamless experience, coordinates the team, and keeps everything organized and moving forward.

Together with our specialized network of professionals, we provide comprehensive, coordinated guidance so you can make confident decisions and focus on what matters most.

## You've Built Wealth. Now Make It Work With Purpose.

The next chapter isn't simply about accumulating more. It's about creating freedom, protecting what you've built, preparing the people and causes you care about, and leaving a legacy.

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