



WEALTH MANAGEMENT FOR BUSINESS OWNERS IN SOUTH CAROLINA

Navigate Success. Protect Freedom. Build Legacy.

You built something valuable. Now let's build clarity, confidence, and a financial strategy that works just as hard as you do.

[SCHEDULE YOUR STRATEGY SESSION](#)

We help South Carolina business owners navigate the complexity of wealth so they can live with more freedom, impact, and purpose.

From pre-liquidity planning to post-exit strategy and generational legacy, we deliver integrated wealth management that aligns your money with what matters most.



Business Owner Focused

We understand the unique financial challenges of building, selling, and transitioning a business.



Customized Strategies

Your wealth plan is tailored to your goals, risk tolerance, time horizon, and what you value most.



Fiduciary Always

As a fee-only, SEC-registered RIA, we act in your best interest—always. No commissions. No conflicts.



Protect What Matters

We help you protect your wealth, your business, and your family with comprehensive risk management.



Comprehensive Planning

Investments, tax strategy, estate planning, risk management, and legacy—coordinated and aligned.



Generational Legacy

We help you define your legacy and create a plan that carries your values forward for generations.

Life Before & After Liquidity

BEFORE LIQUIDITY

We help you prepare for what's next.

- ✓ Business valuation considerations
- ✓ Tax-efficient exit planning
- ✓ Retirement & lifestyle planning
- ✓ Risk management & insurance
- ✓ Estate & succession planning



AFTER LIQUIDITY

We help you transition with confidence.

- ✓ Investment strategy & diversification
- ✓ Tax planning & cash flow strategy
- ✓ Philanthropy & legacy planning
- ✓ Family governance & education
- ✓ Multi-generational wealth planning

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Your business took you years to build. Your wealth strategy deserves the same intentionality.

— Steven Tolleson
Founder & Wealth Advisor

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.

Let's Navigate Your Next Chapter—Together.

Schedule a complimentary, no-obligation strategy session to discuss your goals and explore how WIN can help you navigate your wealth with clarity and confidence.

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