



DVFBC Member Benefit Includes:

- **A one-hour financial planning consult**
- **Your future financial projection**
- **Tips and counsel for decision making and financial security**

Working in conjunction with your existing advisory team (Family Business Advisor, CPA, Attorney, Insurance Agent, Realtor, etc), our team takes the fear of the unknown out of financial planning and puts you and your family members on a smart and efficient path toward achieving your goals and dreams. Our services include:



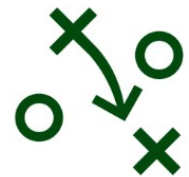
Investment Management



Estate Planning



Asset Protection Strategies



Tax Strategies



Education Planning



Charitable Giving



Retirement Planning



Family Business Planning

3 Valley Square, Ste 110
Blue Bell, PA 19422
T 610.650.1848
F 888.980.6768
IMWealthPartners.com

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