

Strategic Alignment

IndiWealth may incorporate several strategies within an investment plan to focus on each mission and time horizon.

Actively Managed

IndiWealth will actively manage strategies and allocate opportunistically based on relative value analysis but with a risk-managed approach

Your Time Matters

IndiWealth believes that the time horizon is the most critical element of an investment plan. Our portfolios focus on time to achieve the mission and are risk-managed according to the proper time frame.

Tax Efficiency

When applicable, tax efficiency should be considered a key component to an asset allocation strategy. By incorporating tax-sensitive management with tax-efficient assets, investors can keep more of what they earn in returns

Time-Focused Strategies

Short Term (I.W.S.T)

1 – 3 Years
Conservatively Managed
Preservation / Income

Intermediate Term (I.W.I.T)

3 – 7 Years
Balanced Approach
Hedged Equity / Income

Long Term (I.W.L.T)

7+ Years
Invested For Growth/ Legacy
Capital Appreciation Assets

Tax Efficient Strategies

Tax Efficient Short Term (T.E.S.T)

1 – 3 Years
Preservation / Income
Munis / Tax Efficient ETFs

Tax Efficient Intermediate (T.E.I.T)

3 – 7 Years
Balanced Approach
Tax Efficient Risk Hedging

Tax Efficient Long Term (T.E.L.T)

7+ Years
Growth / Legacy
Lower Turnover

IndiSeries Strategies

IndiStock

100% Individual Stocks
Long Term Capital Appreciation
Fundamental Analysis
Diversified by Industry / Market Cap

IndiBond

100% Fixed Income ETFs
Total Return Focus: Price and Income
Relative Value Analysis
Diversified by Bond Segment



IndiWealth

11670 Fountains Dr, Ste 200

Maple Grove, MN 55369

Indiwealthmanagement.com

Disclosures

IndiWealth LLC is a Minnesota registered investment adviser. Information presented is for educational purposes only intended for a broad audience. The information does not intend to make an offer or solicitation for the sale or purchase of any specific securities, investments, or investment strategies. Investments involve risk and are not guaranteed. IndiWealth LLC has reasonable belief that this marketing does not include any false or material misleading statements or omissions of facts regarding services, investment, or client experience. IndiWealth LLC has reasonable belief that the content as a whole will not cause an untrue or misleading implication regarding the adviser's services, investments, or client experiences. IndiWealth LLC has presented information in a fair and balanced manner. IndiWealth LLC is not giving tax, legal or accounting advice, consult a professional tax or legal representative if needed.

Past performance of information presented should not be relied upon without knowledge of certain circumstances of market events, nature and timing of the investments and relevant constraints of the investment. IndiWealth LLC may discuss and displays, charts, graphs, formulas and/or stock picks which are not intended to be used by themselves to determine which securities to buy or sell, or when to buy or sell them. Such charts and graphs offer limited information and should not be used on their own to make investment decisions. Consultation with a licensed financial professional is strongly suggested.