The Family Guided Office

A coordinated service for affluent families and business owners with $10M+ in assets.

iWealth

PRIVATE CLIENT GROUP

A Network Built Around You

Through the iWealth Private Client Group, you gain access to a carefully selected network of specialists. This isn't a directory—it's a living, breathing team we trust to serve our most important relationships: our clients.

We act as your financial quarterback, integrating these professionals into your plan to reduce complexity and deliver clarity—so you can focus on what matters most.

Who It's For

The Family Guided Office is designed exclusively for affluent families and business owners with $10 million or more in assets who want to simplify their lives, align their professionals, and create lasting clarity across generations.

What You'll Have Access To

Through the Family Guided Office, you'll gain coordinated access to a carefully curated network of professionals — integrated seamlessly into your financial plan by your iWealth team.

Business & Legal

- Corporate Retirement Plan Strategies
- Legal Specialists
- Lending & Credit Resources
- Intellectual Property Guidance

Risk & Protection

- Insurance & Risk Mitigation
- Group Benefits
- Tax Planning Professionals

Family Legacy & Estate

- Trust & Estate Attorneys
- Trust Administration Services
- International Planning Resources

Lifestyle & Strategy

- Business & Life Coaching
- Health & Medical Specialist Referrals
- Private & Family Travel Coordination
- Investment Management Team Access

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PRIVATE CLIENT GROUP

Your dream, Your team

We're here to guide you – every step of the way.

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