



Why SPM?

- Broad range of comprehensive wealth management services
- Single point of contact to coordinate a multi-disciplinary team
- Consultative approach with no proprietary products
- Personal, flexible, and customizable planning – one size does NOT fit all
- Transparent, fee-based platform is available

Core Services

- Financial Planning
- Retirement Income Planning
- Asset Protection Planning
- Insurance Planning
- Tax Reduction Planning
- Wealth Transfer Planning
- Charitable Gift Planning
- Succession Planning
- Deferred Executive Comp. Planning
- Business Retirement Planning

A Truly Integrated Approach...

Select Portfolio Management, Inc. (SPM) offers a truly integrated approach to wealth management; one that focuses not just on the accumulation of assets, but also on the preservation, protection, utilization, and transfer of wealth to future generations and charitable causes.



At SPM, we introduce you to concepts typically used by the affluent and empower you with the knowledge and strategies you can use to help achieve your goals.

One Contact for All Your Needs...

As wealth accumulates, so does the number of advisors...attorneys, accountants, investment managers, insurance professionals, trust officers, etc...to the point where they may lack a coordinated approach on your behalf. To overcome this, your **SPM Wealth Advisor** acts as your personal wealth strategist, integrating the activities of your team of advisers into one multi-disciplinary plan which will help you achieve the security and peace of mind of having a comprehensive plan to help achieve your overall financial goals.

Objective Advice, Always...

SPM is a federally-regulated Registered Investment Advisory firm. Securities are offered through our own independent broker-dealer, **Securities Equity Group**, member FINRA, SIPC & MSRB. Insurance is offered through our own insurance wholesaler, **SPM Insurance Services, Inc.** If you have concerns that your current advisors might be restricted by the limitations that a “captive advisor” faces, then you need to investigate how the independence of an SPM Wealth Advisor may benefit you.