APELLA
Advice for Life

The Apella Difference

We start with your life—and build your plan around it

We are passionate about working with our clients and helping them achieve their most important long-term goals.

At Apella, our focus is *You*

We deliver innovative planning and investment solutions built on independent, Evidence-Based thinking. Instead of speculation and guesswork, we use insights drawn from academic research, and decades of data to build portfolios and plans that put science on your side.

We offer a wide range of wealth management services

- Comprehensive ***financial planning*** to make sure you can achieve what is most important to you
- Making sure your portfolio supports your long-term goals through ***investment management***
- Protecting your family, yourself, your assets and your business through ***insurance***
- Helping families plan and prepare for educating children and grandchildren
- Helping ***business owners*** protect their business, provide benefits to employees, or buy or sell a business
- Making sure you have money to pay for the unexpected as well as a regular income in retirement through ***cash and income planning***
- Helping you leave a legacy for your loved ones and your preferred charities through ***estate planning***
- Working closely with your other financial professionals, including your CPA and Estate Attorney, to ensure an ***efficient and coordinated approach***

A dedicated team of Advisors & Specialists, all working for You

Our team of professionals are passionate, hard-working individuals who truly want to make a difference in the lives of those they serve. They are personally invested in helping you plan for—and achieve—your preferred financial future.

As fiduciaries, we are committed to putting our clients' interests above our own. Always. Our team has decades of experience in all the critical areas that help make up a successful financial plan. We'll help you anticipate and prepare for life's biggest financial hurdles, so you can worry less about the future and enjoy today more.

And we will provide timely education and communications and exceptional service along the way.

Whether you're just beginning your personal financial journey, or you're seeking help with more intricate planning and investment needs, we're committed to putting our collective knowledge and experience to work for you.

You are how we measure success.

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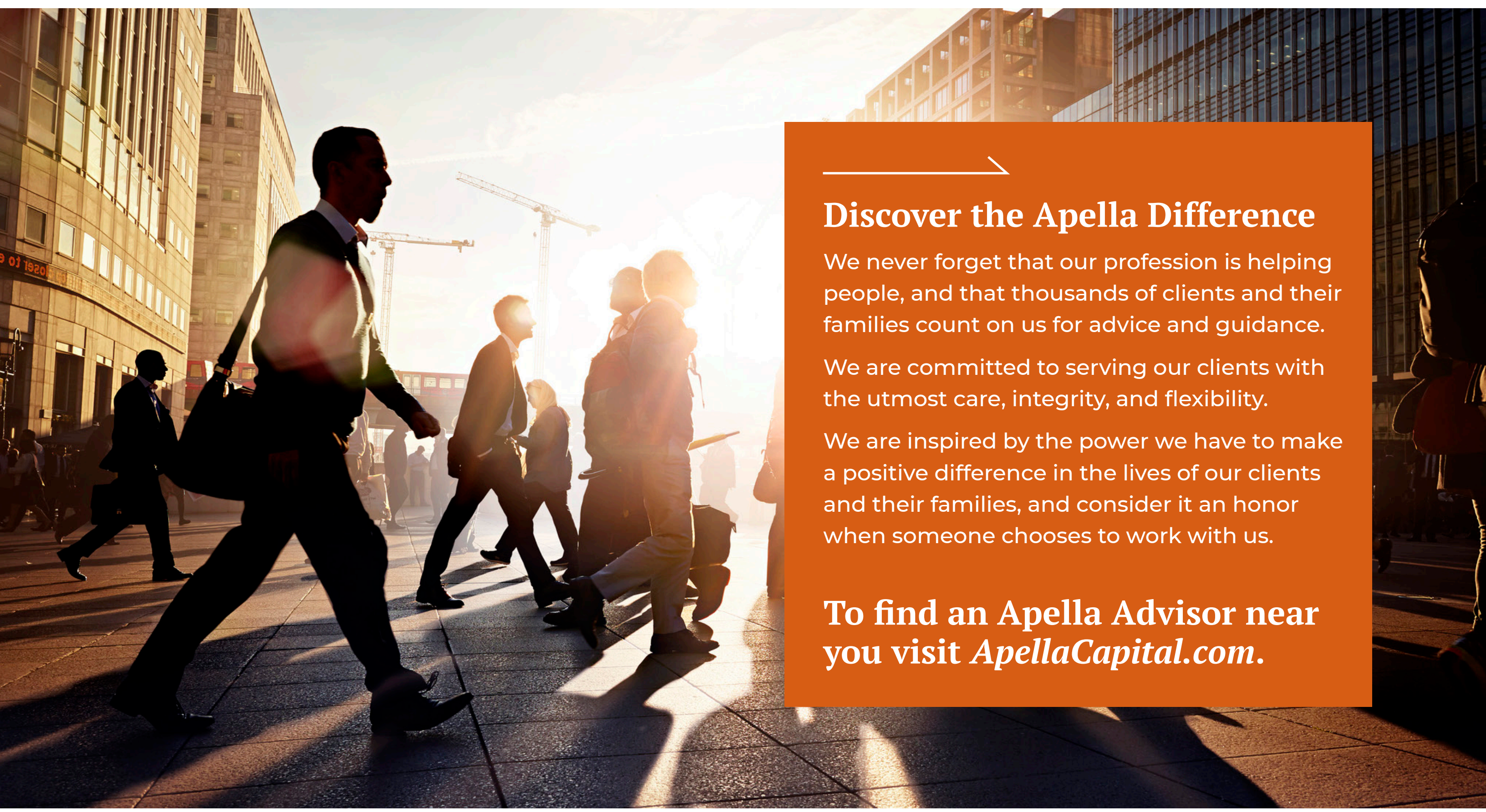
Nationwide scale, local focus

With Apella, your day-to-day needs are met by a dedicated team located in your region. But that's only the beginning.

With approximately 2.4 billion dollars in client assets under management and advisement, we have the scale to serve backed by personalized, hands-on service and support, including paraplanners, operations staff, a full suite of the latest tools and technology, and knowledge in key areas such as college planning, social security, tax management, retirement plans, and more.



Discover the Apella Difference

We never forget that our profession is helping people, and that thousands of clients and their families count on us for advice and guidance.

We are committed to serving our clients with the utmost care, integrity, and flexibility.

We are inspired by the power we have to make a positive difference in the lives of our clients and their families, and consider it an honor when someone chooses to work with us.

To find an Apella Advisor near you visit *ApellaCapital.com*.