



**Area of Expertise: Wealth Management**

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**Company Overview:**

Money isn't just financial – it's emotional. It's not simply monthly statements, spreadsheets and stock tickers, it's about the myriad choices we make every day, both big and small. At United Capital, we not only understand the emotional component of money, the way we work is designed around it. Our process and our mission are very simple – to help you get control over your entire financial life by improving the choices you make. With nearly \$15 billion in assets under management, the team brings considerable strength to bear on behalf of their clients. They are true wealth advisers, offering paralleled personal service, objective guidance, and keen insight to assist clients with every aspect of their financial life.

**Year Founded:**

1990

**Core Services:**

- Retirement Planning
- Tax Planning
- Estate Planning
- Insurance Planning
- Education Planning
- Trust Services

**What Makes Us Different:**

Our philosophy of doing business is simple and straightforward. First, every client relationship we have is precisely that – a relationship built on trust, respect, honesty and open communication. We are humbled by the faith clients place in us and tirelessly work to uphold it. Second, we strive to preserve the capital you have worked so hard to accumulate, while growing it to meet investment and life goals. We love what we do and believe we do it better than anyone else. Everything we do for clients is driven by these values.

**A Snapshot of Our Client List:**

This information is confidential.



For more information about this Core24 approved provider, contact Colleen Schwake at [colleens@core24.com](mailto:colleens@core24.com) or 720-670-0671