



THE
WealthPartners
REPORT



WealthPartners

PRESERVATION • GROWTH • LEGACY

A BLUESPRING WEALTH PARTNER

The WealthPartners STORY

WealthPartners was founded in 2005 by John Hill. His vision was to provide wealth management to select clients while forming a partnership with each of those clients, which is how the name WealthPartners originated.

Since the firm's founding, our team has expanded to better serve our clients with the brightest and most skilled team members. Of our six investment advisor representatives, three are Certified Financial Planner® professionals and one is a Certified Public Accountant. Our clients benefit from a truly comprehensive experience. We see ourselves as financial architects, helping our clients coordinate all aspects of their financial lives so that they can best meet their life goals.

Every client's perspective and goals are placed at the forefront of our relationship. Clients are respected, heard, and valued. Every recommendation we make is geared towards helping our clients reach their goals and experience a confident, peaceful retirement.

Our vision involves ways to develop and maintain client relationships, from striving for client service excellence to strengthening our systems and operations. It's not enough to deliver superb wealth management to clients, but equally important to have valued partnerships that serve as a true testament to the type of firm WealthPartners continues to be. We welcome you to join our journey and become a part of the WealthPartners story.



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FINANCIAL ARCHITECTS,
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HIGHLIGHTS & Accomplishments

FIRM INVESTMENT REVENUE GROWTH

ANNUALIZED



12%

PAST 5 YRS

FIRM ASSET GROWTH

ANNUALIZED



11%

PAST 5 YRS

CLIENT RETENTION

98%



478

HOUSEHOLDS



Data shown is not indicative of future performance and not representative of individual clients' experience.

ANNUAL NUMBERS

DESIGNATIONS



1

CPA

3

CFP®s

1

AIF®

1

CPFA®

6

Investment Advisor Reps



ASSETS UNDER MANAGEMENT

\$567,909,647

OUR TEAM

INDUSTRY YEARS

FIRM YEARS



John F. Hill, CFP®
MANAGING DIRECTOR

38

19



Steve Massey, CFP®, CPFA®, AIF®
MANAGING DIRECTOR

37

19



Jeff Turnipseed, CPA
MANAGING DIRECTOR

31

10



Erin McCain
DIRECTOR OF OPERATIONS

22

10



Tisha Koury
BUSINESS MANAGER

14

14



Melissa Craig
WEALTH MANAGEMENT ANALYST

12

10



John Beers, CFP®
DIRECTOR OF PLANNING AND INVESTMENTS

10

6



Jackson Sharp
WEALTH MANAGEMENT ANALYST

4

1

SERVICES

INVESTMENT MANAGEMENT

- Individualized Asset Allocations
- Globally Diversified Portfolios
- Ongoing Monitoring & Rebalancing
- Quarterly Investment Strategy Auditing

RETIREMENT PLANNING

- Income Distribution
- Tax-Deferred Investing
- Long Term Care Analysis

COMPREHENSIVE WEALTH MANAGEMENT

- Comprehensive Financial Planning
- Portfolio Design & Management
- Data-driven Reporting
- Estate and Business Succession Strategies

CORPORATE RETIREMENT PLANS

- 401(k), 403(b), Profit Sharing Plans
- Help companies oversee a current plan or develop and implement a new one
- Help participants with enrollment with simple plan choices and overall financial retirement wellness and success



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