



BLACKDIAMOND
P L A N N E R S

Independent Financial Advice
HIPO™ Wealth Management
Fiduciary Relationship

Helping to Get Your Financial House in Perfect Order





WELCOME TO BLACK DIAMOND PLANNERS

We believe clients want more than just an investment plan, tax plan, or the perfect estate plan. As we see it, they want it all. They need it all.

We also believe that having a comprehensive systematic approach to wealth management is the best, most direct path to our clients meeting their financial goals. This is why we created our HIPO™ process, a fiduciary wealth management service that is 100% client focused.

Our mission statement says it most simply:

We strive to get our client's financial House In Perfect Order.



John Duckworth, CFP®
Principal
(630) 541-8827

“I believe one of the great opportunities of life that everyone wants, but few enjoy is the extraordinary financial result that can come from having a long-term comprehensive financial strategy.”



Brandy Harrington, CFP®
Principal
(630) 796-6385

“Helping people is my passion, both personally and professionally. I am honored to be a trusted advocate in my clients’ lives. For more than 25-years, I have been privileged to serve as a partner in their financial well-being.”



Joel Riley, CFP®
Principal
(630) 541-8768

“What matters most to our clients is what matters most to us! We work tirelessly to serve our clients. Once their financial house is in order, we are there for them to transition their plans as life unfolds.”



OUR SERVICES

We offer strategic planning in the areas of:

- Financial Planning
- Investment (including a focus on tax alpha portfolio design)
- Retirement
- Tax
- Estate & Charitable Giving
- Risk Management & Insurance
- Cash Flow & Budgeting
- Complimentary Assistance to Family & Friends

WHAT IS MOST IMPORTANT

We find what is most important to our clients falls into the categories of Family, Occupation, Recreation, and Money.

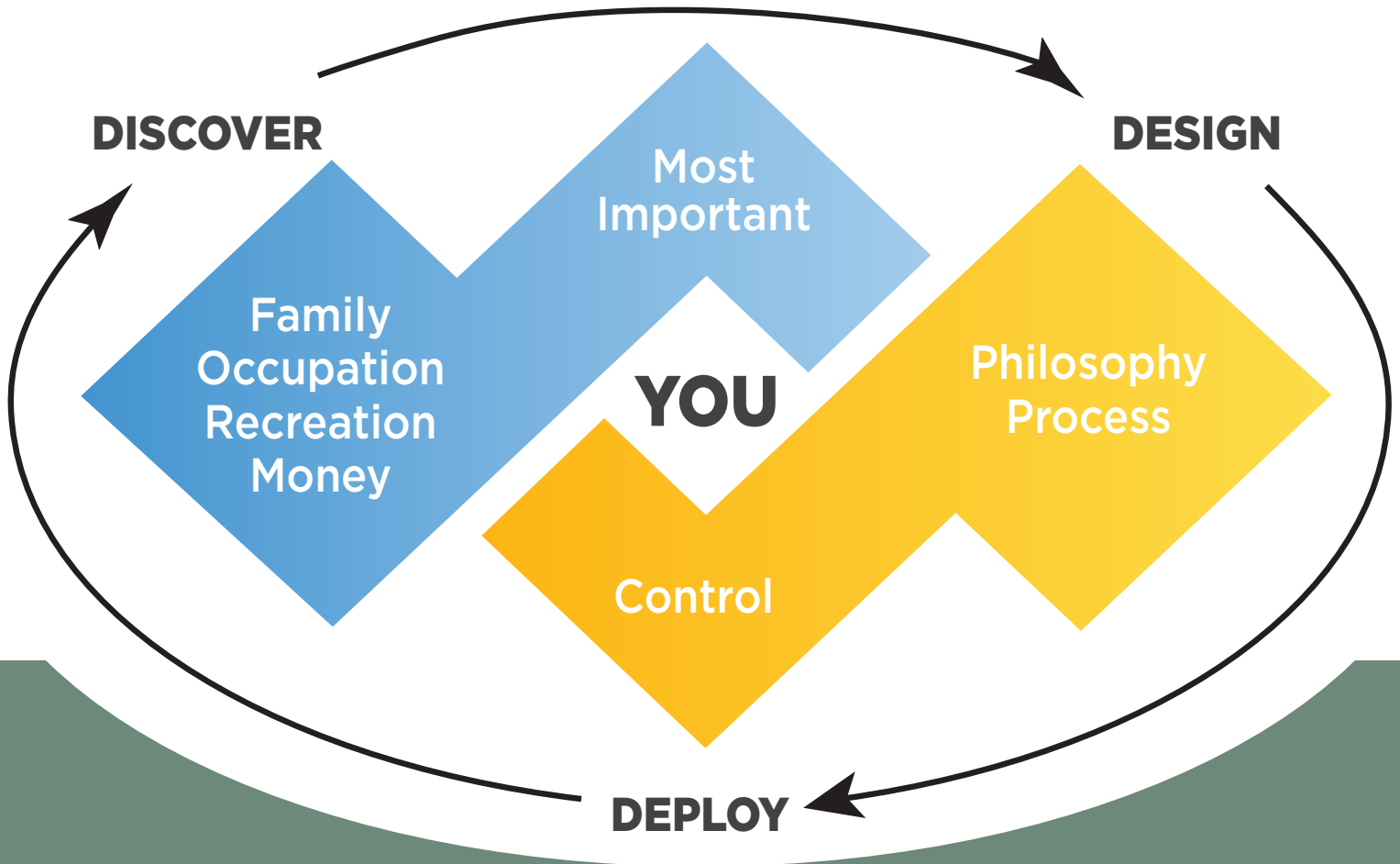
Black Diamond Planners' HIPO™ process includes listening and learning about these priorities and helping set goals unique to each client.



OUR HIPO™ PROCESS

House in Perfect Order (HIPO™) Wealth Management

HIPO™ is our systematic approach to wealth management that is 100% client focused. HIPO™ is the best, most direct path for clients to meet their financial goals. Our HIPO™ process is customized to each client based upon their priorities.



OUR PARTNERSHIP WITH YOU

It is of course by design that we have YOU, our client, at the center of our HIPO™ process. We want to discover what is most important to you, then design and deploy your financial plan that is focused on helping get your financial House In Perfect Order.



WHAT WE CAN CONTROL

Our strategy is to focus on what we can control:

Our Philosophy: We believe it is possible to design and live an extraordinary life with holistic fiduciary financial planning.

Our Process: Using HIPO™ allows us to take a systematic approach to customize a financial plan for each client that is focused on achieving their most important goals.



BLACKDIAMOND
P L A N N E R S

BLACK DIAMOND PLANNERS | 3140 Finley Rd, Ste C | Downers Grove, IL 60515 | www.BlackDiamondPlanners.com



We are **champions** and **advocates** for our clients.

We believe in **clear communication**.

We believe our **systematic process** helps simplify financial complexity.

We believe in **education** and **continuous improvement**.

We **solve** client issues using **creative** and **traditional** methods.

We believe in **giving back** to our local and global communities.

We believe you deserve HIPO™ Wealth Management.

Black Diamond Planners is a d/b/a of HighPoint Planning Partners, a registered investment advisor. Advisory services are only offered to clients or prospective clients where Black Diamond Planners and its representatives are properly licensed or exempt from licensure.

Advisory services are offered through HighPoint Planning Partners, LLC. Custodial services are offered through LPL Financial, LLC ("LPL Financial"). Black Diamond Planners and LPL Financial are not affiliated.

For additional information, please visit our website at www.BlackDiamondPlanners.com.

For current HighPoint Planning Partners information, please visit the Investment Advisor Public Disclosure website at www.adviserinfo.sec.gov by searching with HighPoint's CRD #316636.

