

**WE HELP CLIENTS
MAKE CONFIDENT
FINANCIAL DECISIONS
- NOT JUST MANAGE
INVESTMENTS**



**INTEGRAS
PARTNERS**

**Integras Partners helps bring clarity to the tradeoffs
between today's lifestyle and future goals.**

By modeling scenarios such as major purchases, career changes, and retirement, we help clients understand the impact of important financial decisions before they are made.

Your money is invested to align with the timing of your goals, allowing near-term needs to be protected while long-term assets have time to grow.

(404) 941-2800

integras@integraspartners.com

integraspartners.com



WHO WE SERVE

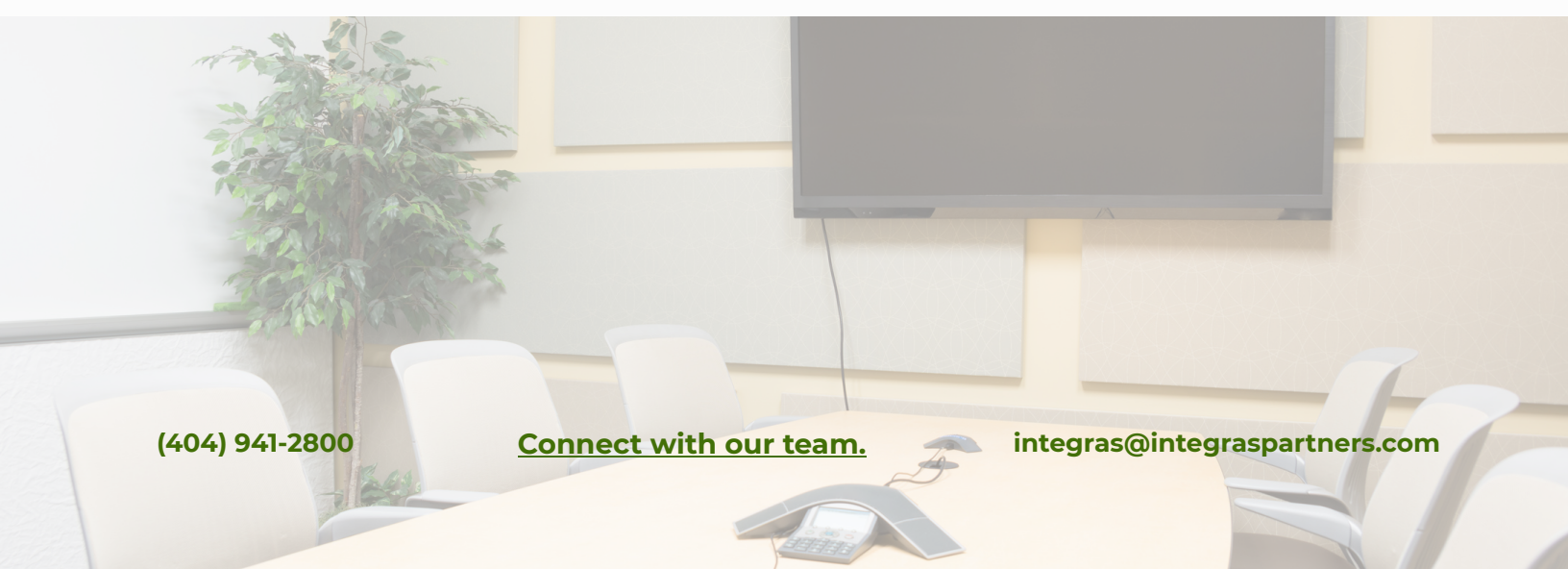


Integras Partners works with individuals and families who value being good stewards of their money and want confidence in their financial decisions.

Our clients often include:

- Young professionals building strong financial habits
- Busy professionals whose financial lives have become more complex
- Individuals preparing for retirement
- Retirees seeking confidence around spending
- Those navigating career changes, financial events, or caregiving

Since 2010, our focus has been to put clients first. As an independent firm free from corporate pressures, every decision is made with your best interests in mind.



(404) 941-2800

[Connect with our team.](#)

integras@integraspartners.com

HOW WE CAN HELP

Peace of Mind Comes from Sound Financial Decisions

As part of our partnership, we provide guidance across many areas where money impacts your life.

INVESTING

- Active Management
- Goal Funding
- Alternative Investments
- Tax Efficiencies
- Ongoing Monitoring and Adjustments

RETIREMENT

- Retirement and Lifestyle Scenarios
- Income Strategies
- Social Security Timing
- Healthcare Planning

GOAL PLANNING

- Education
- Major Purchases
- Charitable Strategies
- Legacy Planning

GENERATIONAL CONVERSATIONS

- Elder Housing
- Care Management
- Financial Continuity
- Legal Strategies
- Personal / Data Security

ADDITIONAL SERVICES

- Workplace Benefits Review
- 401(k) Review
- Insurance Reviews



 [Genconvos.com](https://www.genconvos.com)



HOW WE MANAGE YOUR MONEY

Short-Term

Money needed soon is invested with the least risk, so daily market movements don't interrupt your spending plans.

Near-Term

Money needed in the next few years is invested for stability and income, so even challenging market periods don't interrupt your plans.

Medium-Term

For goals several years away, we may introduce diversification beyond stocks and bonds, like private real estate and debt investments.

Long-Term

Money invested for long-term goals is focused on high-quality stocks, seeking moderate growth while generating dividends that can help smooth volatility over time.

Longest-Term

Longest-term money can accept more short-term volatility in pursuit of higher long-term growth. We may include smaller companies, international markets, and growth-oriented investments.

WHY FINANCIAL HEADLINES DON'T WORRY OUR CLIENTS

When investments are aligned with the timing of your goals, market noise matters less, and confident decisions become easier.

When near-term needs are planned for, you are less exposed to short-term market swings and better positioned for long-term growth.

A TRUE FIDUCIARY PARTNERSHIP



WHAT YOU CAN EXPECT FROM US

Partnership

We are committed partners throughout your financial journey. As life events occur, we help you navigate the financial decisions that come with them.

Communication

We're here to talk when you need us. We regularly send market and economic commentary, investment performance reports, and explanations of investment decisions.

Personalized Investment Strategy

We don't use a cookie-cutter approach. We will take the time to fully understand your situation and customize your investments to match your goals.

Fiduciary Commitment

As fiduciary investment advisors, we always act in your best interest. We don't receive commissions on investments. Our transparent fee is based solely on assets we actively manage.

HOW TO HELP US PARTNER WITH YOU

The best outcomes come from working together. Your engagement helps us keep your investments aligned as life changes or opportunities arise. Staying connected keeps you moving forward with clarity and confidence.

Connect with our team.

(404) 941-2800

integras@integraspartners.com



INTEGRAS
PARTNERS