



Wealth Management  
— Your Life Elevated —

Offering financial planning to individuals and families to help them understand what is available to them and empower them in the journey.





## YOUR DEDICATED TEAM



**Juan Carlos Vazquez**

Founder and Chief Wealth Manager

714-592-1398 | [jvazquez@wisdirect.com](mailto:jvazquez@wisdirect.com)





## STANDING BY YOUR SIDE

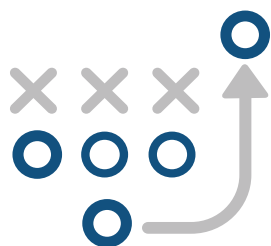
We exist to help your financial dreams become a vivid reality.

At JCV Wealth Management, we believe that financial growth is obtained through good old fashioned hard work, unprecedented perseverance and an uncompromising passion for doing the right thing. We know there are no shortcuts to reaching financial success, which is why we are committed to providing our clients with the unbiased and objective advice they deserve.

Our highly personalized approach allows us to better understand your financial goals, while our team of planning professionals takes the time to guide you through a customized multi-point financial plan and coaches you all the way to success.

We are humbled by the opportunity to stand by your side and help provide clarity for the future.





## STRATEGIC FINANCIAL GUIDANCE DESIGNED TO SERVE YOU, YOUR FAMILY AND YOUR BUSINESS

Our mission is to empower you with an experienced team to help navigate and execute your life and family aspirations. Working in conjunction with your existing advisory team, our proven process helps identify, understand, and navigate the financial complexities one may face as wealth is accumulated. IM Wealth Partners prides itself on creating a simple, enjoyable experience to not only achieve, but exceed your goals.

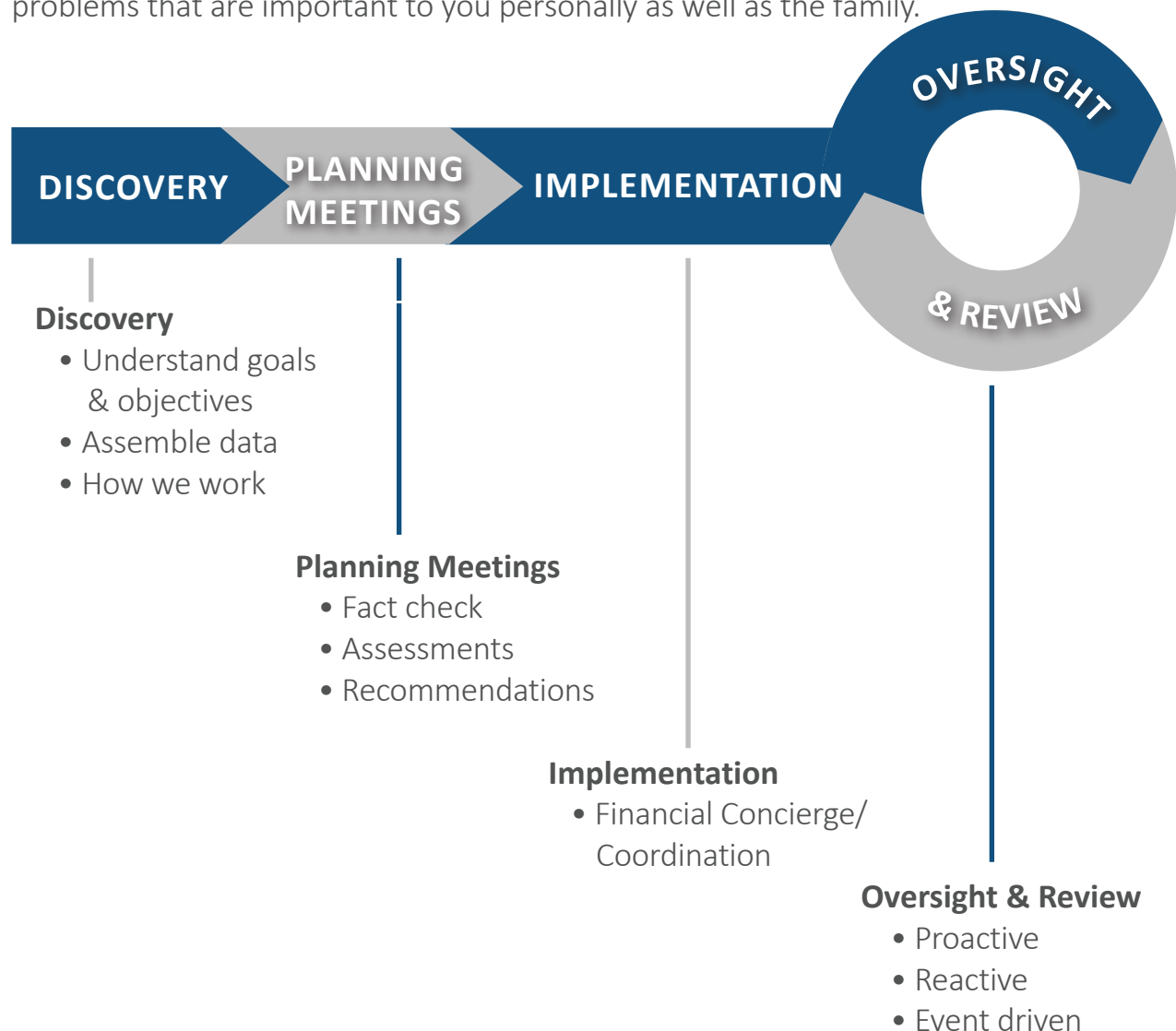
### **Strategic Financial Guidance Includes:**

- Cash Flow Planning/Budgeting
- Investment Advisory
- Insurance Advisory
- Real Estate Advisory
- College Funding Strategies
- Charitable Guidance
- Estate Planning
- Family generational Wealth
- Tax Efficiency



## PROVEN PROCESS - THOROUGH YET EFFICIENT

When it comes to mapping out your financial future, we take a holistic approach to planning. We are with you every step of the way providing key knowledge, personal care and innovative solutions. Our team deeply understands the challenges associated with protecting and preserving wealth and provides solutions to solve the problems that are important to you personally as well as the family.





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## WE LOOK FORWARD TO CONNECTING WITH YOU

### **JCV Wealth Management**

2400 E Katella Ave, Suite 800

Anaheim, CA 92808

Phone: (714) 592-1398

[www.jcvwealth.com](http://www.jcvwealth.com)

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