

# Tri County Community Foundation

[www.TCCFSC.org](http://www.TCCFSC.org)



[@TriCountyCF](https://www.instagram.com/TriCountyCF)

## G3 Wealth Advisors

### Northwestern Mutual Private Client Group

G3 Wealth Advisors is an established firm comprised of eleven highly credentialed and experienced financial advisors who specialize in wealth management and comprehensive financial planning. We are dedicated to helping our clients financially navigate all seasons of their life to ultimately achieve their goals. We do this by gaining a detailed understanding of what our client's goals are and then create a roadmap for how to get there. In addition to personal finance, we also specialize in working with business owners. We help many business owners implement benefits for themselves and their employees in order to maintain competitiveness in the labor market, enhance the value of their business, and achieve sustainability.

We differentiate ourselves by our commitment to create a formal written financial plan for every client. These plans are specific to each client and serve as the foundation in assisting our clients with making well educated financial and investment decisions assuring that they support the clients goals both in the short term and long term. Additionally, we work closely with our clients other trusted advisors to include attorneys, CPAs, and trustees as needed to ensure all planning decisions are cohesive and complete.

In addition to these services, independent practitioners may find value in our expertise in 401k Profit Sharing and Cash Balance Plans. These are qualified plans that can be of great benefit for employee retention as well as potentially significant pre-tax savings for the practice owners and key employees.

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