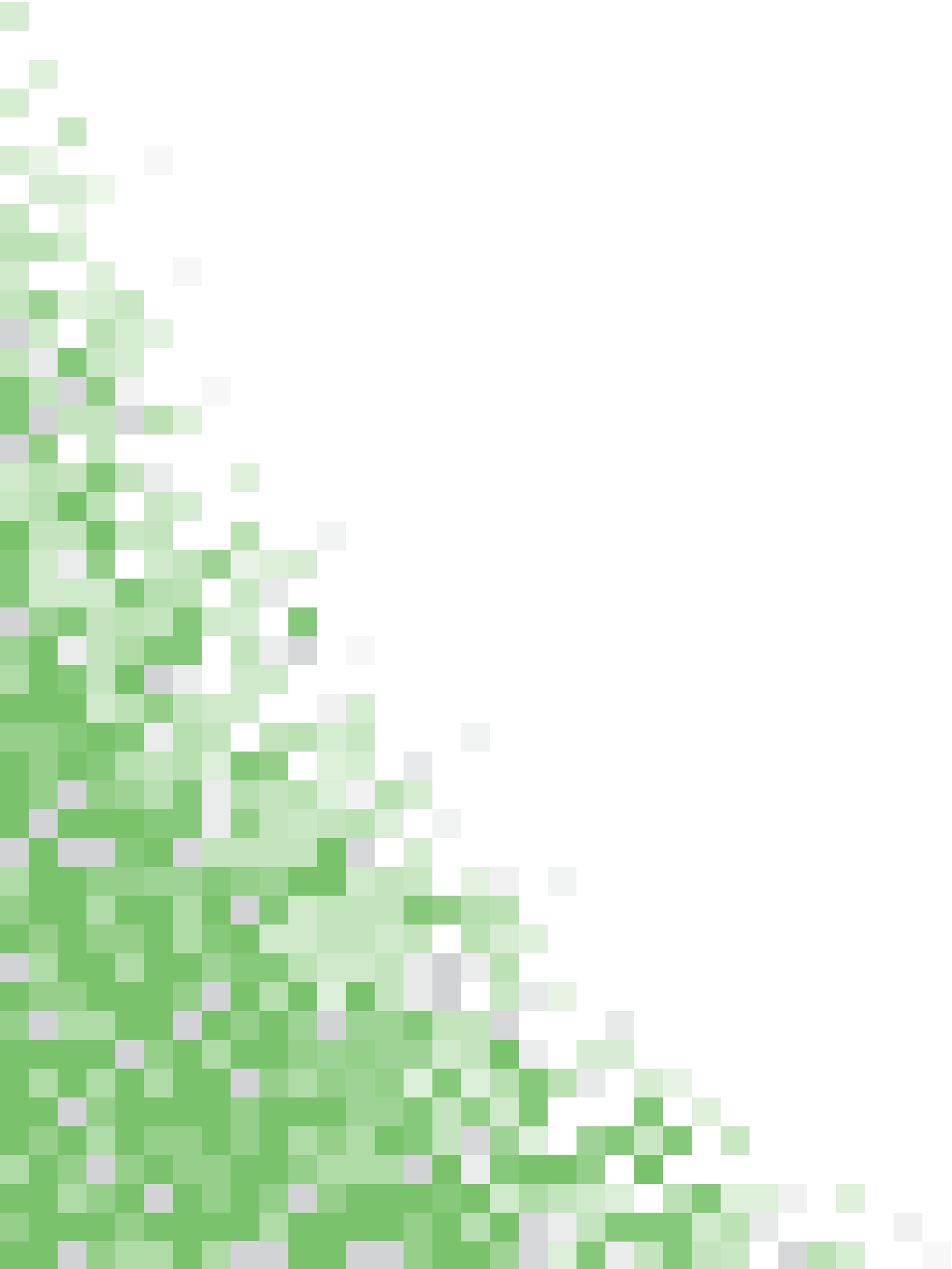


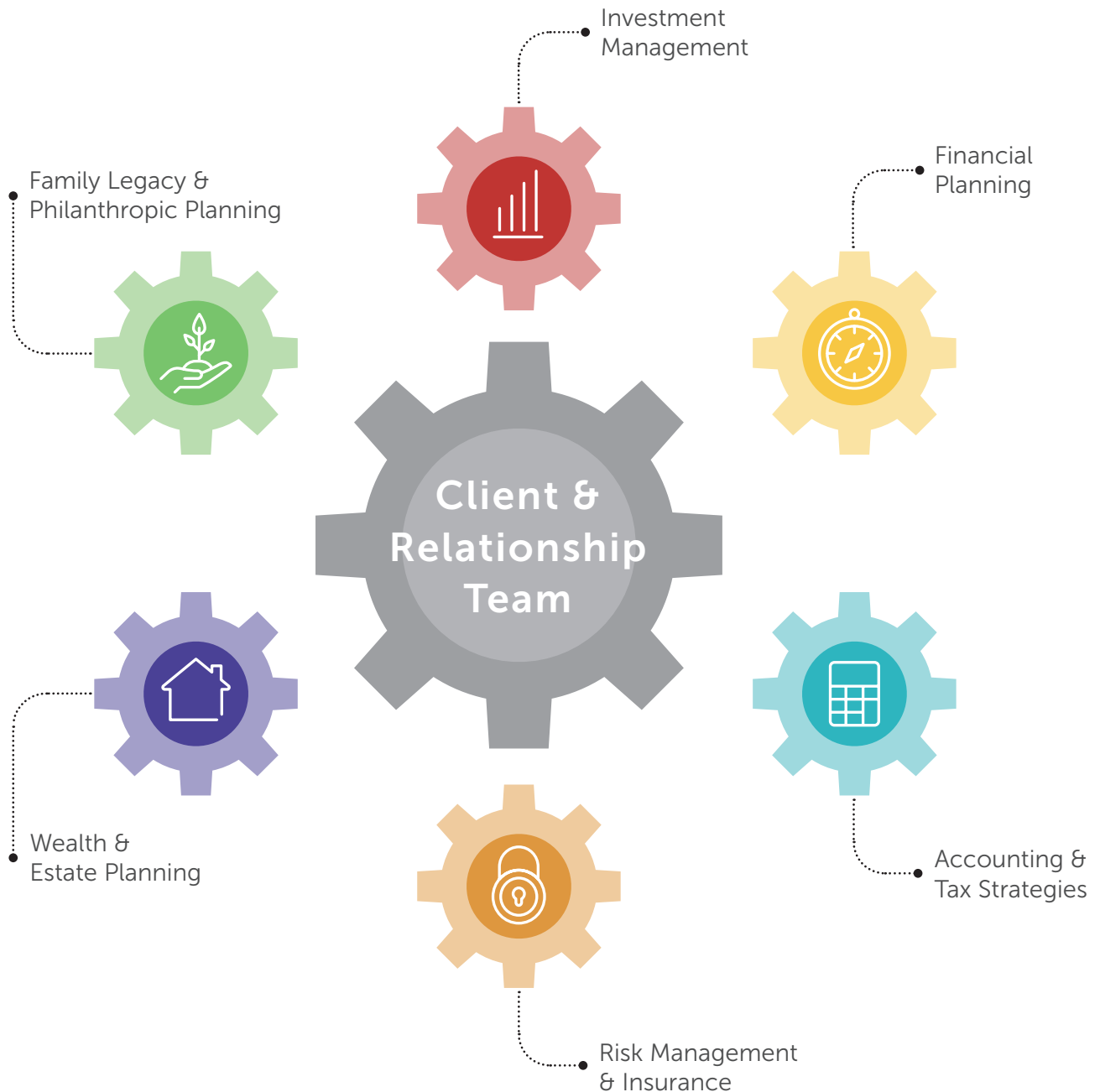
do etail  
wealth partners



# Simplifying Success

Dovetail is a consulting firm that partners with successful entrepreneurs and professionals to coordinate, manage and accelerate their personal wealth goals.

We focus on several core services that drive our clients' wealth plan, providing services directly or "quarterbacking" these relationships to oversee and ensure compliance with client goals.



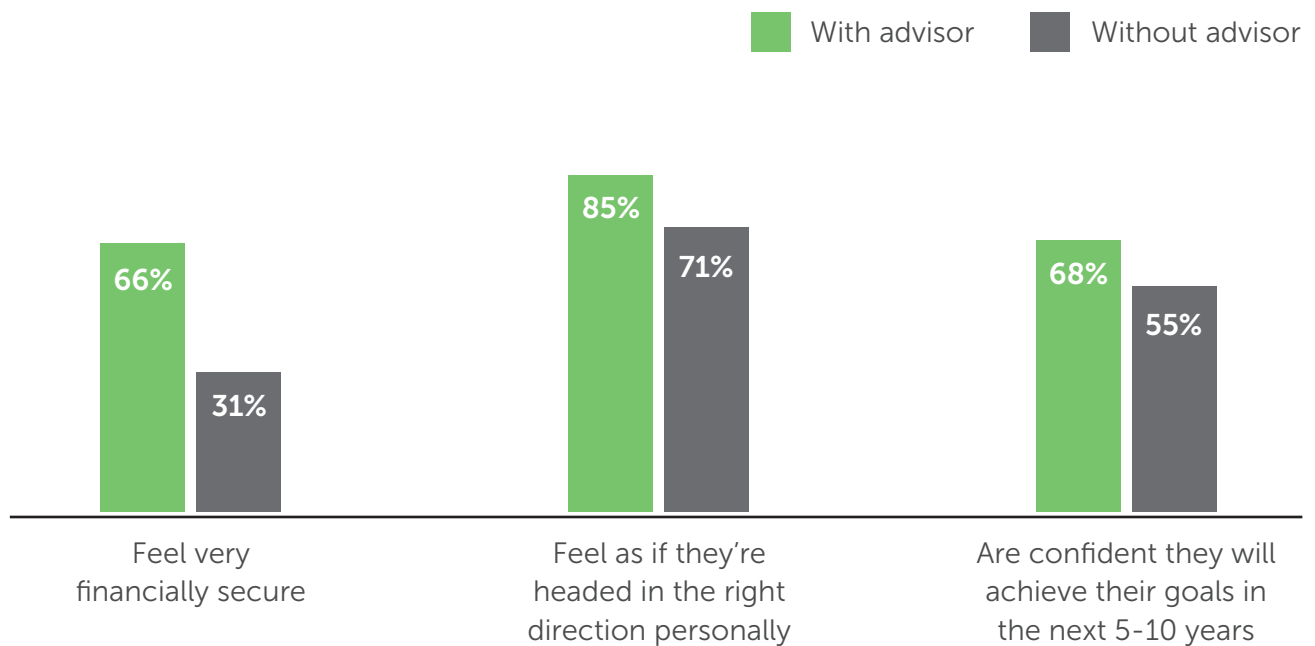
In addition to our core services, Dovetail provides ancillary programs through strategic partners that are designed to further protect our clients' wealth plan and/or enhance their client experience.

- Identity & Fraud Protection
- Healthcare Consulting
- Technology Consulting
- Medicare & Social Security Planning
- Payroll & Bookkeeping
- Travel & Entertainment
- Real Estate & Relocation Services
- Personal, Home & Business Security

## Why Dovetail?

Dovetail was created to fill an increasing need for comprehensive and coordinated financial and professional services. We use an intensive discovery process to establish and implement a strategic plan for every client, combining a customized wealth roadmap with the highest level of personalized service.

## Working with an Advisory Team may increase your confidence



Source: Northwestern Mutual 2019 Planning & Progress Study



## Contact Us

[support@dovetailwp.com](mailto:support@dovetailwp.com)

262-729-3103

[dovetailwp.com](http://dovetailwp.com)