Offering You More Possibilities At Our New, Independent Wealth Advisory Firm

My partners and I recently announced the launch of our independent registered investment advisory (RIA) firm, Octavia Wealth Advisors. The eight of us made the transition from our former firm, Midwest Financial Partners, where I've spent my 15-year career working with this group. Our decision comes at a pivotal moment and is a true progression of our services to be able to provide our clients with quality and unbiased advice.

As an RIA we are fiduciaries, which means we are obligated to put our client's best interest first. This isn't anything new to the way we've always conducted ourselves, but we now feel better represented as an independent firm offering conflict-free advice. In addition to being true fiduciaries, being independent enables us to implement technology that is best suited for clients and expand our investment offerings and strategy to offer comprehensive investment, retirement and insurance guidance. We're better positioned to be nimble and responsive to market conditions and we've enhanced our client service offerings to be a true partner to our clients.

This transition is a product of wanting to better serve our current clients and future clients with greater transparency. Our integrated team of specialists is united by a single purpose: helping you build financial security throughout your lifetime-while preserving your wealth for generations to come.

I have a particular passion for education and financial literacy and helping people truly understand their financial needs. Financial education is often not taught early enough and leaves many adults vulnerable to missteps in the future. I love being able to work with clients each day and help them better navigate their decisions for a sound financial future.

In addition to working with clients addressing financial needs at every stage of life, we also have retirement plan services working with business owners for their company's 401(k) plans as well as schools and tax-exempt organizations in the 403(b) market.

We'll still be in Mission Valley, with offices across the country, and the same team you're accustomed to with a more effective way of helping you succeed.

Mike Ingram is partner/wealth advisor at Octavia Wealth Advisors. He can be reached at mingram@octaviawa.com or call the office at 619-557-8241.