The mission of On Target Wealth Partners is to provide clients with disciplined, long-term, passive financial management via risk appropriate investment portfolios and goal-based financial planning integration. As an Indiana State registered investment advisor firm, On Target Wealth Partners offer clients the following fundamentals in its advisory relationship:

- **Integrity and Commitment:** The bedrock foundation of any advisory business worth its salt is uncompromising integrity. Trust and partnership must never be questioned to accomplish stated financial goals. On Target Wealth Partners was formed to consult versus sell, listen versus preach, deliver versus maintain, and above all, sincerely commit to a professional and honest pursuit of financial goal attainment for all clients.

- **Conflict-Free Advisory Structure:** As an independent and a registered investment advisor firm, On Target Wealth Partners is held to the same fiduciary and ethical standards as CPAs, lawyers and physicians. The clients' best interests are paramount to the firm's ultimate success. On Target Wealth Partners will not accept any product commissions, incentives or conflicts of interest in providing the most appropriate client solutions and advice.

- **Proven Investment Philosophy:** Eighty years of market data and significant academic evidence clearly indicate a passive investment strategy with properly designed and diversified portfolios based on appropriate asset allocation is the model of best results. On Target Wealth Partners works together with clients to maximize long term returns at a desired level of risk.

- **Cost and Tax Efficient Awareness:** On Target Wealth Partners always seek highly efficient portfolio solutions for clients knowing that excessive management fees, advisory fees, taxes and other related expenses can be a significant drag on returns and wealth creation. Passive, low turnover and low cost funds along with tax efficient asset allocation offer the best long term after-tax returns.

- **A Wealth Plan Unique to Each Client:** While the fundamentals, investment philosophy and institutional class products will always drive On Target Wealth Partners' advisory recommendations, each and every client will have their own unique solution. Services are personalized and customized to identify and address all circumstances relevant to each client's lifetime goals.