McINTOSH
& ASSOCIATES

The team at McIntosh & Associates
is here to help guide you toward
your ideal retirement.

Let's get started.

wealthmichigan.com

Where you end up in retirement depends on the route you took to get there.

There was a time when retirees took a similar path to retirement: a steady pension combined with Social Security and personal savings.

Today, that path to retirement looks very different; pensions are increasingly rare, and the future of Social Security is unclear, leaving many people to rely solely on their savings and personal investments.

With the help of financial planning professionals, you don't have to feel alone on your road to retirement. By working with McIntosh & Associates, you'll have access to a team of dedicated retirement professionals ready to create tailored strategies designed to guide you toward your golden years.

Welcome!

At McIntosh & Associates, we're proud to offer a Dream Focused Wealth Plan to help you design your ideal retirement.

Our Core Values and Commitment to You

We are committed to maintaining the highest standards of integrity and professionalism. We work tirelessly to understand your financial goals and provide the highest-quality information, services and products you need to help reach them.

Our core values guide our planning every step of the way, from accumulation to implementation to legacy planning. When we sit down with a client, we're guided by honesty, responsibility, flexibility, respect and integrity, a set of values we're proud to use as the bedrock of our family-oriented style of planning.

When you work with McIntosh & Associates, you become a very important member of our family. We look forward to welcoming you to our family and helping you achieve financial confidence, harmony and joy.

Nolan McIntosh, DPT

Investment Adviser Representative

Mindy McIntosh

Licensed Insurance Professional
Founder & President

Utilizing the McIntosh signature SERVE philosophy, Mindy and Nolan create retirement and insurance solutions designed to help clients achieve their goals and live their best retirement through holistic strategies.

Following college, Mindy started her insurance solutions business in 2002 and quickly grew a large network of satisfied customers. After a career in physical therapy and athletic training, Nolan decided to switch gears and provide the same type of care to his clients in the financial industry. They use their dedication to family values to offer quality services and the best solutions to help each client reach their desired retirement goals. Together, they offer a holistic approach combining health insurance, tax-efficient strategies, retirement income strategies and Social Security timing to create a comprehensive retirement plan for clients.

Mindy graduated with a bachelor's degree from Michigan State University, and holds her life, health and accident insurance licenses. Nolan graduated from Lake Superior State University with associates and bachelor's degrees and holds a Doctorate in Physical Therapy from Andrew's University. Nolan holds a series 65 securities license.

The McIntosh family enjoys spending time together outdoors, especially exercising and swimming. Mindy and Nolan love to spend their free time supporting their three daughters, Haylee, Ava and Naomi, whether it's helping with a school play or taking the girls to soccer and dance practice.

How We
Can Help

Using the Dream Focused Wealth Plan, we make sure you are as prepared as possible for retirement by helping ensure your income needs are fulfilled. Our goal is to design retirement income strategies to help our clients not outlive their money.

STEP 1

Discovery

Getting to know you and your goals.

STEP 2

Analysis

Helping you examine and direct your plan.

STEP 3

Solution

Presenting a retirement strategy.

STEP 4

Implementation

Monitoring your portfolio and making changes.

Updates

After your plan is implemented, we don't stop there. We'll continue to monitor and meet with you to review your financial plan and portfolio on a periodic basis to ensure your customized plan still fits with your goals.

How We Serve You

Once your goals have been established, we will customize appropriate strategies to suit your vision and objectives. We can help you execute a sound financial program with the following products and services:

- Retirement Income Strategies
- Wealth Management
- Annuities
- Investments
- IRA/401(k) Rollovers
- Asset Protection Strategies
- Life Insurance
- Medicare Solutions
- Health Insurance
- Tax-Efficient Strategies
- Long-Term Care Strategies
- IRA Legacy Planning

We can also refer you to professionals who provide the following services:

- Trusts
- Probate
- Charitable Giving
- Estate Planning
- Tax Planning

Reach Your
Retirement Destination

With consistent communication, effective evaluations and continuous support from the industry's top strategic partners, McIntosh & Associates is fully equipped to help you design and live the retirement of your dreams.

Riskalyze

Through its patented technology, Riskalyze takes into account key investor factors and creates a Risk Number. This unique number allows our team to help clients adjust their portfolios accordingly and avoid knee-jerk reactions to market fluctuations.

Orion

Orion collects data from other platforms like Riskalyze and inStream. This software continually integrates account data and automatically links account households. By linking these platforms, we can create an effective strategy to help our clients pursue their long-term investment goals.

InStream

InStream helps advisors keep clients' strategies on track by providing daily account recalibration alerts when a plan is no longer in line with its intended objectives. With regular updates, advisors can make changes in real time to help ensure all client plans are working toward their goals.

No obligations.
Just solutions.

McINTOSH
& ASSOCIATES

Where your financial health is just as important as your physical health.

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Neither the firm nor its agents or representatives may give tax or legal advice. Individuals should consult with a qualified professional for guidance before making any purchasing decisions. Investing involves risk, including the potential loss of principal. Any references to protection benefits, safety, security, lifetime income, etc generally refer to fixed insurance products, never securities or investment products. Insurance and annuity product guarantees are backed by the financial strength and claims-paying ability of the issuing insurance company.
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