

WEALTH INSIGHTS



The road to financial security can be filled with hard to navigate twists and turns. Luckily, Sarasota and Bradenton are home to credentialed advisors and wealth management organizations designed prepare investors for all phases of life. In this roundtable we spend time with experts at Caldwell Trust Company and Integrity Wealth Management.

CALDWELL TRUST COMPANY



IN A MEDIA-MAD WORLD WHERE 24-HOUR NEWS CYCLES CAN LEAVE PEOPLE BREATHLESS, it's comforting to know some businesses still provide a stable environment that brings its clients peace of mind. Such is Caldwell Trust Company, which adheres to its founding principles: to operate as an independent trust company that delivers traditional trust services in a highly personalized manner to individuals and their families. The privately owned business, with offices in Venice and Sarasota, dates its origin to the 1970s when Roland G. Caldwell established Caldwell & Co., an advisory firm providing investment guidance for the trust industry. By the late 1980s, as banks merged or moved away and clients were left to bear the burden, Roland laid the groundwork for a company to serve individuals for generations to come. R. G. "Kelly" Caldwell Jr., a high-honors engineering graduate from Georgia Institute of Technology, and several respected associates joined in the venture. It was chartered in 1993 as Caldwell Trust Company. Kelly Caldwell is CEO and president. Upon completing its first ten years of operation, Caldwell Trust Company had \$200 million in assets under management. In 2013, after the second ten years, the amount had more than tripled to over \$650 million. Today assets under management exceed \$820 million. Key factors in growth have been the proprietary software that gives the company a competitive edge and the company's strong focus on people. "Taking care of families is our primary mission," says Kelly Caldwell. The business also manages retirement plans for employers. Besides its commitment to financial activities, Caldwell Trust Company is heavily invested in community service.

Caldwell Trust Company marked its 20th anniversary with a new state-of-the-art, 11,500-square-foot headquarters building in Venice—one designed to accommodate continuing growth. "We're a 22-year overnight success," Kelly says with a smile.

INTEGRITY WEALTH MANAGEMENT



INTEGRITY WEALTH MANAGEMENT IS A FAMILY OWNED AND OPERATED WEALTH MANAGEMENT FIRM that has served the Sarasota community since 2003 by providing for the long-term needs of both current retirees and the “baby boomer” generation. The team helps in assisting clients create strategies that offer lifelong income, reduce their taxes, and protect what matters most to them. Sam Cione founded his firm on the belief that wealth means more than just money- it might represent a lifetime of hard work, the freedom to say “yes” to more, and a legacy of love for those his clients care about. Integrity Wealth Management prides itself on helping clients live and retire well using conservative investment strategies and tax-efficient plans for distributions. The firm also has strategic relationships with accountants, attorneys, and other specialists to ensure that clients get the right advice for their unique personal situation. Sam Cione believes that Integrity Wealth Management’s family first attitude is his company’s greatest asset. He is committed to upholding the values of integrity, honesty, competency and stewardship while treating clients with the respect and kindness they deserve. Firm members strive to provide an extraordinarily high level of personalized service and ongoing support that doesn’t stop once a client account is established. Sam’s goal is to communicate, follow through and worry about every detail so that his clients don’t have to. Whether your retirement journey is already planned or you’re looking for the right team to help navigate you along the way, Integrity Wealth Management is dedicated to serving the growing community of persons at or near retirement in the Gulf Coast region. New client consultations are available.

Integrity Wealth Management is a registered investment advisory firm based in Sarasota, Florida and dedicated to helping those at or near retirement create solutions for attaining their lifestyle and income needs. They tailor personalized plans for each of their clients and strive to develop long-lasting relationships with the individuals and families they serve. Integrity Wealth Management, Inc. is registered as an investment advisor with the state of Florida. Registration as an investment advisor does not constitute an endorsement of the firm by securities regulators nor does it indicate that the advisor has attained a particular level of skill or ability.