

# Stephen H. Wagner, CFP®, CEPA®

## CEO, Integrity Wealth Advisors

A Leading RIA Firm in Southern California



YEARS OF EXPERIENCE

**30+**



ASSETS MANAGED<sup>1</sup>

**\$274M**

FACTS



YEARS OF PODCASTING

**5+**

### TOPICS

- For **Business Owners**: Exit Planning Challenges & Opportunities
- For **High-Bracket Taxpayers**: Tax Strategies Your CPA May Be Missing
- For **Major Donors**: Often-overlooked Giving Strategies Allowed by the IRS
- For **Retirees**: Portfolio Positioning For Each Stage of Life

### QUESTIONS

- Why you should make charitable giving part of your financial plan?
- How can you balance financial goals and philanthropy?
- How can an owner plan for sale of business?
- When should you start planning for retirement? Is it too late?
- What are the most common estate planning errors people make?



steve@iwaplan.com

**805-339-0760**

Integrity Wealth Advisors is a Registered Investment Advisor. 1 Assets under management as of 12/31/2024, as filed in the firm's annual ADV disclosure.

