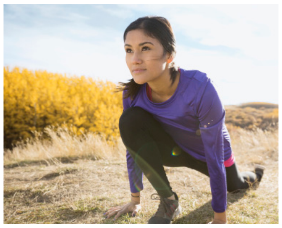
lifewise



MEDIA INFO

CONNECT WITH US

https://www.facebook.com/lifewiseadvisors

https://twitter.com/talktolifewise

https://www.linkedin.com/company/lifewiseadvisors

lifewise

HOW IT ALL BEGAN

The story behind Lifewise is quite simple, really. We searched tirelessly for a financial planning and investment management solution tailored to young professionals that provides just the right mix of powerful technology and human collaboration and came up empty. As two of the largest generations in American history, Millennials through Generation X are busy, educated professionals who have generally been overlooked by most wealth management firms. These firms cater to those in or near retirement, prefer lengthy, face-to-face meetings and favor paper over technology.

So we decided to build the type of financial planning and investment solution preferred by people like young business professionals, couples buying their first home or young families, all in need of financial planning and investment services who want something different than what is available. Many don't have the time (or the desire) to meet face-to-face with the high-end, high-touch wealth management firms. And many want a little more than just interfacing with the Internet as your guide.

After talking with numerous people fitting this description, we designed Lifewise with a single purpose in mind: To provide powerful financial planning and investment capabilities to the younger generations who are searching for financial independence.

Starting young allows us to have a much greater impact on their life and the lives of their family members. When people begin investing later in life, their options and their income growth become very limited. By starting early, we can open up a world of possibilities that can help them achieve the life they envision, both now and in the future.

We believe that planning and investing should be driven by our clients' personal aspirations for life experiences and their family values. We also believe that our investment methodology must be rooted in solid academic research conducted by the best and the brightest researchers and investors.

OUR COMMITMENTS

Transparent: Everything we do, from our fee structure to our advice, will be straightforward, upfront and easy to understand.

Easy to Use: We will provide an experience that is nearly effortless and that's what we provide. We're focused on giving our clients more free time, not filling it up.

Collaborative: We value partnerships, which is why we provide each client with their own personal advisor who focuses on our clients' needs, not just their assets.

Powerful Technology: Innovation drives us and allows us to bring our clients the very best tools and technology available, anywhere.

Education: We live and breathe financial planning and we know our clients don't, so educating them on the best way to manage their finances is our forte.

Your Best Interest: Our clients deserve a partner who operates with their clients' best interest ahead of their own. At all times. Period.

lifewise

EXPERTISE

Matt Cosgriff, CERTIFIED FINANCIAL PLANNER™ and personal finance expert for young professionals, is the intrapreneur behind Lifewise; a Minneapolis based financial planning and investment solution for busy young professionals. Matt specializes in working with busy, driven young professionals (millennials and Gen X) passionate about balancing both their personal lives and their careers and who want to truly understand how their money works, how they can better manage it, and ultimately how they can use it as a tool to empower their perfect life.

Matt's mission is to help young professionals be wise with their money and simplify their lives by focusing solely on the things that matter in life. He is best known for his educative, friendly, and innovative approach to financial planning and has been featured in various publications, including the Investment News, Yahoo Finance, and the Star Tribune. He is also a member of the Financial Planning Association and is involved in the NexGen community within FPA.

Away from the office, you can find Matt playing or coaching youth hockey, reading anything that has to do with entrepreneurship or personal finance, or trying out one of Minneapolis' many great restaurants.

Simplify your life and your finances today with Lifewise and get powerful financial resources and educational materials at your fingertips at www.lifewiseadvisors.com.

Matt Cosgriff, CFP®
CERTIFIED FINANCIAL PLANNER™ practitioner
Founder Lifewise™
3800 American Blvd W, Suite 1000
Minneapolis, MN 55431
P: 952.563.6901
www.lifewiseadvisors.com
matt@lifewiseadvisors.com

LIFEWISE BLOG POSTS

What John Oliver Revealed About the Financial Services Industry

What Exactly is Financial Planning?

So Am I on Track for Retirement?

The High Earner's Secret to Getting Money Into a Roth IRA

Tackling Your Student Loans: A How-to-Guide

To MBA or Not to MBA? That is the Question

How an Index Card Can Save Your Finances

Money Saving Tax Tips for Young Professionals

The Young Professionals Guide to Investing

Why You Should Avoid Buying the iPhone 6s

How an Advisor Can Help: Time, Interest and Expertise

Read more on the Lifewise blog here

lifewise

GUEST AUTHOR

Journal of Financial Planning: The Value of Being a Client's Chief Editing Officer

Fortune: 3 Secrets to Intrapreneurial Success

XY Planning Network: An Advisor's Best Friend: The Ability to Say "No"

Fortune: How to Create a Culture of Intrapreneurs

XY Planning Network: How Young Advisors Can Serve Their Peers Within Existing Firms

Fortune: This is the Alternative to Entrepreneurship

Nerd's Eye View at Kitces.com: Intrapreneurship and Launching a Next Gen Offering in An Existing Financial Advisory Firm

Primer Magazine: 9 Investment Terms Every Guy Needs to Know

Chelsa Krost: Values and Money – Do Yours Align?

Millennial Magazine: Dominate Your 401(k) with These 6 Valuable Tips

Primer Magazine: 4 Tricks to Jumpstart Your Finances in the New Year

RECENT MEDIA

Forbes - 7/31/16: What Financial Planners Wish You Were Doing About College Savings

The Street - 6/20/16: How's Your Financial Wellness? Take This Quiz

Investment News - 6/15/16: XY Planning Network On the Hunt for Innovative Financial Adviser Technology for Young Clients

U.S. News and World Report - 5/18/16: 13 Money Hacks to Turbocharge Your Investments

Star Tribune - 4/4/16: Financial Services Industry Throwing Out Rule Book to Attract Millenials

Market Watch - 3/28/16: 5 Psychological Biases That May be Costing You a Fortune

XY Planning Network - 2/24/16: Ep #36: Serve NexGen Clients Inside Your Existing Firm (Podcast)

Practically Speaking - 1/14/2016: Intrapreneurship: A Young Advisor's Pitch to A Traditional Advisory Firm

Go Banking Rate - 1/7/2016: How to Make More Money in 2016

Go Banking Rates - 12/9/2015: 10 Reasons Millennials Spend More Than They Earn

Self Lender - 12/4/2015: Financial Advice That Finance Experts Wish They Had Listened To When They Were Young

Financial Advisor IQ - 12/3/2015: FAs Who Are Making Robo Tools Work for Them

Time - Money - 11/9/2015: The Best College Savings Plan You May Never Have Heard Of

The Street & MSN Money - 10/21/2015: Juice Up Your Long-Term Savings During Retirement Week

Investment News - 10/21/2015: eMoney and MoneyGuidePro Take a Second Stab at an Integration

Yahoo Finance! - 10/13/2015: Investing 101: What You Need To Know

Star Tribune - 9/22/15: Want Sound Financial Advice? Skype Or Tweet A Millennial

MarketWatch & Reuters - 8/18/2015: New Financial Planning Solution, Lifewise, Meets Busy Young Professionals Right Where They Are

SPEAKING ENGAGEMENTS

FPA Minnesota Symposium - Why Intrapreneurship is the Key to the Future of the Wealth Management Industry

XY Planning Network 2016 Conference - Serving NexGen Clients Inside Your Existing Practice

FPA BE National Conference - Intrapreneurship: Launching a Next Gen Practice

FPA BE National Conference - Panel Discussion