INNOVATIVE WEALTH BUILDING

You're on an Important Journey, We can Help!

Innovative Wealth Building
15250 Ventura Blvd, Suite 730
Sherman Oaks, CA 91403

innovativewealthbuilding.com

MEET THE FOUNDERS

WARREN BROOKS

JENNIFER BROOKS HILL

KENNAH PARHAM

TERRY PARHAM

"Talent wins games, but teamwork wins championships."
- Michael Jordan,

Who
We are Innovative Wealth Building also known as "IWB".

What
IWB is a registered investment advisor, regulated by the Securities Exchange Commission

Why
IWB exists to help others pursue financial freedom.

How
We help our clients implement strategies that are aligned with their goals and best interests.

Company Stats

2
offices

100+
years of experience

13
team members

1,000+
families served

AUM **$350,000,000+**
AUM

Our Mission:
to Empower others on <u>their</u> Journey to Financial Freedom.

THE WEST COAST TEAM

KENNAH PARHAM

CFP® ChFC®

Financial Planner

Kennah is the Chief Technology Officer (CTO) and one of the co-founders of Innovative Wealth Building.

Kennah became a financial planner in 2016 and is a graduate of Hawaii Pacific Univeristy (HPU) where she earned a bachelor's degree in International Business.

Kennah enjoys the opportunity to support clients on their journey to financial freedom. She's also passionate about fitness and nutrition and is a Certified Nutrition Coach (CNC)in her spare time

Kennah is a Certified Financial Planner (CFP) and a Chartered Financial Consultant (ChFC).

Kennah lives in Los Angeles, CA with her husband, Terry, and their sons, Everett and Rhodes.

TERRY PARHAM JR.

CFP® ChFC® CLU® RICP® WMCP®

Financial Planner

Terry is the Chief Financial Officer (CFO) and one of the co-founders of Innovative Wealth Building.

Terry joined the financial services industry in 2011 and has held positions as a: Financial Planner, Corporate Trainer, and District Manager.

Terry graduated from St. Lawrence University with a double major in Economics and Psychology and a minor in Mathematics.

When he’s not working with clients, Terry spends time mentoring other advisors and presenting financial education to individuals and organizations.

Terry lives in Los Angeles, CA with his wife, Kennah, and their sons, Everett & Rhodes.

CFP CERTIFIED FINANCIAL PLANNER

THE AMERICAN COLLEGE OF FINANCIAL SERVICES ALUMNI ASSOCIATION

FPA FINANCIAL PLANNING ASSOCIATION

GUIDING PRINCIPLES

Simplicity

Transparency

Effectiveness

Partnership

OUR VALUES

Family
Our family of professionals is here to serve you.

Achievement
Your goals are our highest priority.

Integrity
We seek to do the right thing , especially when no one is watching.

Teamwork
We leverage each other's strengths for better outcomes.

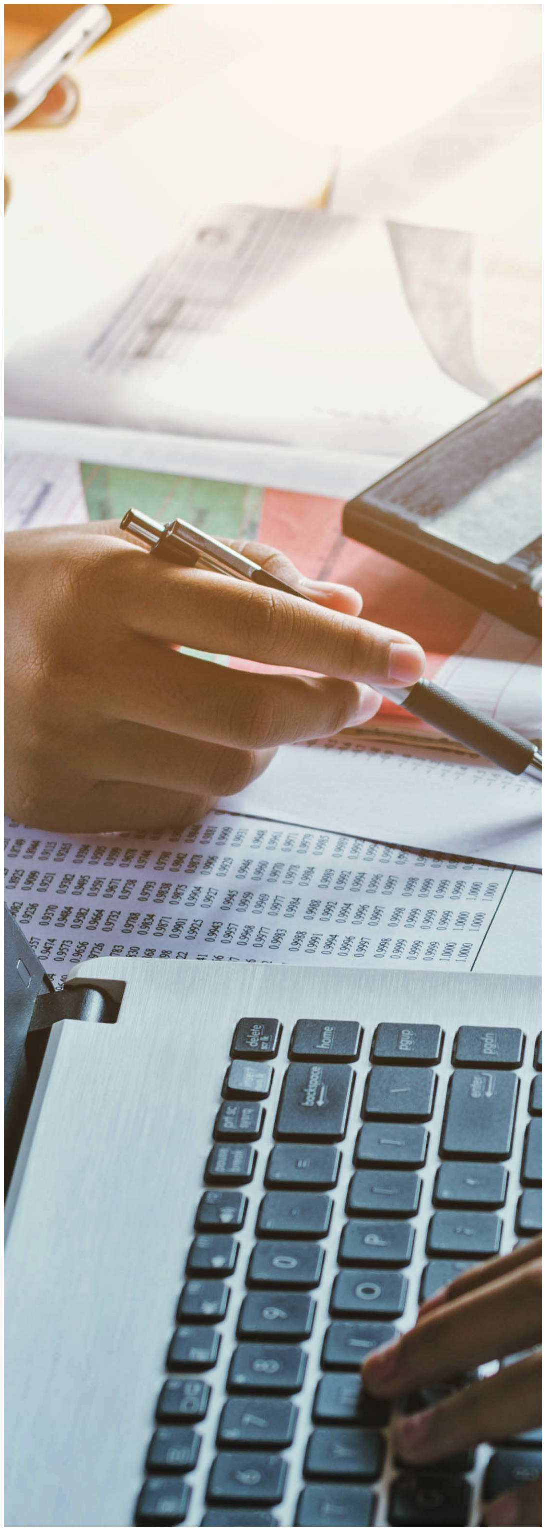
Honesty
We believe that honesty is the best policy.

"When your values are clear, making decisions becomes easier."
– Roy E. Disney

OUR PROCESS

This approach is credited to the Certified Financial Planner Board!

OUR SERVICES



- Comprehensive Analysis
- Retirement Planning
- Investment Optimization
- Managing a Budget
- Minimizing Taxes
- Education Planning
- Social Security
- Medicare
- Estate Planning
- Business Planning
- Life Insurance Analysis
- Long Term Care Strategies

And Much More!

10 Questions to Ask Your Advisor

1. What are your qualifications and credentials?
2. Are you a fiduciary?
3. How do you get paid?
4. What are my all-in costs?
5. What services do you provide?
6. What type of clients do you typically work with?
7. What's your investment philosophy?
8. What limitations do you have?
9. Will I face a tax hit if I choose to work with you?
10. Why choose 'you' instead of another firm?

How does IWB get paid?

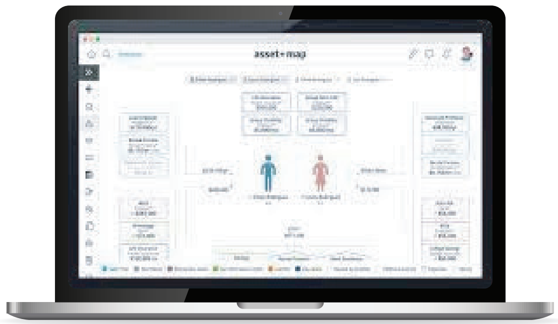
Financial Planning,
$300 - $2,500

Investment Management
0.90%

Product Solutions,
$0 - $$

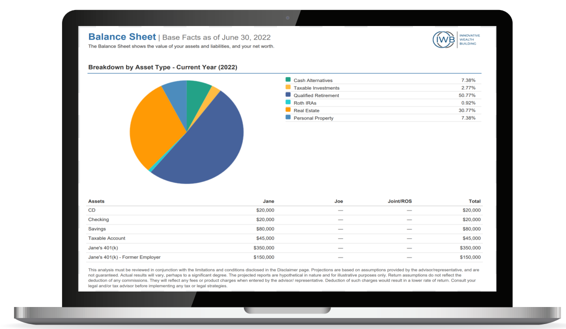
Our Goal is to be a Valuable Partner!

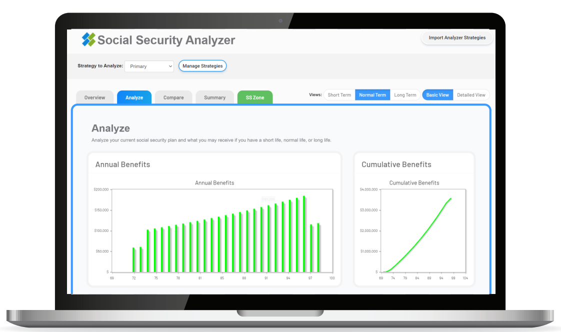
DELIVERABLES



An asset map is a simple tool that can be used to show your full financial picture on one page

A financial plan is a comprehensive report that will allow us to analyze your goals and create custom recommendations that are aligned with your best interest.





A Social Social Analyzer report will provide you with important information that will help you make one of your most important retirement income decisions.

Your One Page Financial Plan will distill your 'big plan' into bitefinancial plan down into easy, actionable steps that will help you pursue your most important goals.

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Connect with us on Social Media!

@innovativewealthbuilding

Scan the QR Code
for more information!