

Flexible Estate Planning



OAK

GenWealth Partners

Simplifying the Journey to Generational Wealth



About Us

Estate planning, financial planning, and business planning can feel overwhelming — especially when you're balancing a demanding career, caring for family, or running a practice or business. Too often, families and business owners avoid critical conversations about money, protection, death, and legacy until it's too late. The result is confusion, conflict, and lost wealth that could have been safeguarded. We exist to change that.

Why Choose Us?

- Free Wills & Trusts for my Clients ✓
- DIY or Advisor Guided Will & Trust ✓
- Software: Easy to use ✓
- FREE Power of Attorney & Healthcare Directive ✓
- FREE Vault: Secure Access for Life ✓

All-in-one Small Business Solutions

We do far more than estate planning — we support the full ecosystem of your small business.

Whether you're building, growing, or preparing to transition your business, we help you put the right pieces in place so you can operate with confidence and focus on what matters most.

- Financial Advising
- Retirement Planning
- All-In-One Budget Tool
- Taxes & Bookkeeping
- Payroll & Workers Comp
- IT and Cybersecurity
- Loans: Mortgage and Business
- Websites & Marketing

- Insurance: Disability, Long-term Care, Life, and Annuities, Health Insurance
- Merchant Services
- Medical Billing & Coding
- Physician Salary Negotiation
- Virtual Notary
- Quick Online Legal Forms

CONTACT US



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