

RICHARD A. BALANCE

As founding principal of Innovative Wealth Partners, LLC, Richard A. Balance utilizes a team approach of professionals who combine their expertise to provide personalized wealth, estate and legacy planning services to individuals, families and business owners. “Our mission” (Rich says) “is to utilize a consultative approach with our extensive network of intellectual capital to provide customized solutions for our clients”. Rich’s personal focus is tax-advantaged financial products, wealth preservation and estate/legacy planning.

Rich is well-qualified to lead his team. His firm is a Registered Investment Advisor and Rich an Investment Advisor Representative. He is a Solomon course graduate and also holds multi-state insurance licenses that allow him to assist clients in the areas of life, long-term care and disability insurance. He is a well-rounded financial professional.

Rich’s professionalism has brought him numerous awards. His honors include being a Hi-Cap recipient (2008-2010) and CPAM designee (2013). Away from work, Rich attends Sacred Heart Church in Palm Desert with his wife of 38 years, (Kerrie). He enjoys playing golf and tennis and is a member of the Toscana Country Club. Philanthropically inclined, he was founder of The Guardian Angels Fund as well as a contributor to the City of Hope and other local charities.



Richard A. Balance, President
Wealth and Legacy Advisor, Insurance Professional

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