



David Mares of Socius Wealth Management Joins the Institute of Untaxable Wealth

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PHOENIX, AZ ? David Mares, founder of Socius Wealth Management, is expanding his firm?s ability to serve high-income professionals, business owners, and near-retirees by integrating advanced tax-efficient strategies into his personalized and partnership-based approach to wealth management.

As part of this evolution, Mr. Mares has been formally accepted as a member of the advanced tax strategy focused Institute of Untaxable Wealth, an independent resource that provides exclusive access to coordinated strategies, industry experts, and planning tools often missed by traditional financial models. This affiliation enhances his ability to help clients navigate complex tax challenges with greater confidence, insight, and control.

With the support of the Institute?s resources, Socius Wealth Management is uniquely positioned to help clients reduce tax burdens on retirement income, business exits, capital gains, and estate transitions?while ensuring every decision is aligned with the client?s personal values and long-term vision for the future.

?This is about giving clients more clarity and control,? said Mr. Mares. ?We?re not here to sell products ?

we're here to guide people with wisdom and strategy, so they can move forward with peace of mind and a real partner by their side.?

Rooted in the Latin word Socius, meaning "Ally" or "Partner," the firm's name captures its mission at the deepest level. Socius Wealth Management isn't just about numbers – it's about relationships. Every client is treated like a long-term partner, with Mr. Mares serving as an advocate and strategic guide through life's most important financial milestones.

To learn more about David Mares and Socius Wealth Management, visit <https://sociuswealthmgt.com>

With a professional background marked by both technical expertise and personal integrity, Mr. Mares is known for building trust quickly and deeply. His clients often come to him at critical life junctures: planning for retirement, selling a business, navigating tax changes, or simply trying to find clarity in a complex financial world.

They're not just seeking performance—they're seeking partnership.

"People want to feel heard," said Mr. Mares. "They want to know their financial life is being stewarded by someone who understands the full picture – and who isn't afraid to ask better questions."

With the support of the Institute's exclusive tools and training, Socius Wealth Management can now offer:

Strategic solutions to minimize taxes during retirement

Guidance on repositioning taxable assets into tax-advantaged income

Advanced preparation for business exits or intergenerational wealth transfers

Legacy planning that protects family wealth and supports future impact

Clients benefit from a boutique experience – tailored, collaborative, and grounded in trust. No one-size-fits-all solutions. No unnecessary complexity. Just strategies that make sense and align with each client's unique life goals.

"At the end of the day, my job is simple," Mr. Mares adds. "Help clients live fully, give wisely, and protect what they've built."

Located at 28223 N 25th Dr, Phoenix, AZ 85085, Socius Wealth Management serves clients both locally and

across the country. The firm is focused on professionals in transition ? including those nearing retirement, business owners preparing for succession, and families seeking to build a lasting legacy of purpose, not just prosperity.

As part of a growing movement to reimagine wealth building through tax-conscious strategy and long-term thinking, David Mares is proud to lead clients with integrity, clarity, and care.

To learn more about the Institute of Untaxable Wealth, visit: <https://instituteofuntaxablewealth.com>

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Socius Wealth Mgt

Socius Wealth is a dedicated financial firm offering personalized, comprehensive financial plans, specializing in retirement planning and federal employees.

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