

# Who We Are

The Financial Insight Center offers unbiased recommendations and a level of individualized service that can be difficult to find from firms affiliated with specific financial institutions. By keeping our focus on you, we work as a team to demonstrate how your financial plan can create the future you always wanted.

OUR DISTINCTION

OUR FOCUS

OUR TEAM

## Our Distinction

Our unique approach to personalized wealth management is what originally set the Financial Insight Center apart, and it's what continues to please clients today.

1

## Independent Thinking

Financial Insight Center is not commission based. We are simply focused on the best wealth management opportunities for you.

2

## Highly Trained Team

Besides excelling in financial strategies, Financial Insight Center advisors are experts with powerful modeling tools that depict accurate and realistic "What if" solutions.

3

## The Insight Retirement Clarifier™

Our own proprietary and proven retirement planning process, The Insight Retirement Clarifier dynamically balances our clients' retirement goals and resources.

4

## Objective Advice

As registered Investment Advisors, it is our fiduciary responsibility to carefully consider all angles of your finances. That means we are bound to act in your best interests; our reputation of integrity supports this role.

5

## World-Class Access

Our stature within the industry allows the Financial Insight Center access to top institutional money managers and other services not available to the typical financial advisor.

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## Our Clients

Although ages, backgrounds, professions, and family status differ, our clients generally have investable assets of \$500,000 or more. We choose to work with a limited number of clients who appreciate a notable level of expertise and individualized service.

## Our Focus

# *The Client Experience*

The Financial Insight Center is about you—not our products or any pre-determined recommendations.

Your financial, personal, and future situation is different from anyone else's, and we treat it that way.

No “cookie cutter” plans allowed.

We make it a point to reveal your life priorities, then customize a strategy to help you reach these goals. We are fee-based and unaffiliated. We consider this part of our commitment to giving you personalized, independent advice that is in your best interest.

Simply put, we believe in putting all our energies and expertise to your advantage. It is this deep-rooted philosophy that has built a relationship of trust with our clients. We have been privileged to expand our business and client relationships throughout the years.

## Our Team

...a variety of financial contexts and  
services, the Financial Insight Center team provides well-  
rounded advice and exceptional service to each of our  
clients. Click a team member's photo to learn more about  
the experience and skills he or she can add to your financial  
plan.



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**BRADY JARDINE**  
PRINCIPAL



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**RICHARD JANKE**  
ADVISOR



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**DALLIN CUTLER**  
ADVISOR



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**DAVID TATE**  
ADVISOR



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**TYLER PETERSEN**  
ADVISOR



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**RYAN KRANTZ**  
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**TIM GOTTFREDSON**  
DIRECTOR OF PLANNING



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**MARK MATLEY**  
PRINCIPAL



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**CHUCK CUTLER**  
PRINCIPAL



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**PAUL SALISBURY**  
PRINCIPAL



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**SUZANNE MICKELSON**  
OFFICE MANAGER



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**CHERIE CHILD**  
OFFICE MANAGER - LOGAN



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**JOAN EGGERS**  
ADMINISTRATIVE ASSISTANT

Financial planning is different at the Financial Insight Center because our very organization is different—from our proprietary planning process to our in-depth wealth and investment management services.

Learn more about our unique approach to planning and how each area of service helps clients achieve their own definition of living a wealthy life.

**THE INSIGHT RETIREMENT CLARIFIER™**

**WEALTH MANAGEMENT**

**INVESTMENT MANAGEMENT**



# Client Center

## My Wealth Management Site

A comprehensive view of your financial assets including investments, insurance, real estate, and more.

**LOG IN NOW**

## My Investment Portfolio

See the investment details of your portfolio including asset allocation and portfolio structure.

**LOG IN NOW**

Contact Us



With offices in Salt Lake City and Logan, Utah, and Pocatello, Idaho, Financial Insight Center provides financial planning and wealth management services to individuals and organizations. Please feel welcome to contact us with your questions.

OR, TO BE CONTACTED BY US, PLEASE COMPLETE THIS FORM:

Name:

City & State:

Phone:

Email:

Your Question or Comment:

SUBMIT

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## **MAP & DRIVING DIRECTIONS**

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## **MAP & DRIVING DIRECTIONS**



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