



☎ 707-933-1328

## Myers DeWitt

Located in the heart of Sonoma wine country **Myers DeWitt** is a firm built around an investor-first philosophy.

The education of our clients is as important as their goals so they truly understand the decision making process. We simplify investing and provide comprehensive solutions to topics covering risk analysis and asset allocation, setting realistic goals, and Trust and legacy planning.

We adhere to a strict code of ethics that captures the essence of our fiduciary responsibilities and the Certified Financial Planner Board of Standards which are the principle guidelines at Myers DeWitt. The primary executive at Myers DeWitt has been a Certified Financial Planner (CFP®) since 1996.

Our mission is to provide our clients with investment advice which promotes clarity and direction to the investment and financial planning process in order to achieve their financial and life goals.

**ACCOUNT ACCESS**

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## Services

We create strategies tailored to your goals

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## Independence

Without any conflicts of interest we put your needs first.

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## Portfolios

We enjoy building trusted relationships that span generations.

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## Building Your Investment Strategy Using HiddenLevers

HiddenLevers is cutting edge technology that identifies your acceptable levels of risk and reward with unparalleled accuracy. Using this tool, we ensure that your portfolio aligns with your investment goals and expectations.

*Together we can take the guesswork out of your financial future.*



FREE RISK ANALYSIS

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