



THE INVESTMENT ADVICE YOU DESERVE.

AND HAVE EARNED.

Summit Trail Advisors is a private investment office founded by a group of experienced professionals with a vision: to deliver clients the investment prowess and resources of a private bank through the independence of a boutique. Today, we are able to choose what we believe are the best resources for our business, and free to make our best recommendations for every client. These independent decisions are anchored by our extensive experience within large investment firms.

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Summit Trail Advisors is please to announce that Peter Lee has been named by Investment News as one of its 40 under 40 for 2018

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OUR APPROACH

We lead with advice, navigating the extraordinary responsibility of significant wealth. Our firm brings together a deep understanding of capital markets, a unique approach to manager research, and a portfolio built specifically for your needs.

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WHO WE ARE

For more than a decade, our founding partners were colleagues at some of the biggest names in private wealth management. Summit Trail lets us continue working together in a stable environment that provides the time and resources to focus on you.

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NEWS

See what others have to say about us, as well as reading investment insights from our team and news about new members of our firm.

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Here's How You Win Hundreds of Prospective Tech Millionaires From the Wall Street Firms

Financial Advisor IQ

Tech startups are set to have a big 2019. Unicorn companies like Slack, Airbnb, and Palantir are set to IPO this year. Hundreds of their employees are about to gain equity shares worth multiple millions and will need advice on how to invest their new wealth. Uber employees are already ripe for the picking, says Tom Palecek, partner of \$7 billion RIA Summit Trail Advisors, which specializes on serving technology-focused entrepreneurial clients.

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Distributing to advisors with a niche: how one \$5bn RIA serves pro athletes

Fund Intelligence

Fund firms need to understand an advisor's client base, says Peter Lee, founding partner of Summit Trail, whose firm uses asset managers to help vet private deals for athletes

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Standing Strong

Citywire RIA Magazine

Cover Story: Lehman Brothers may have collapsed around his ears, but Jack Petersen has built Summit Trail to last.

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