



Welcome

WE'RE GLAD YOU'RE HERE



VisionTree Financial Advisors offers comprehensive financial planning, investment advisory, insurance, and risk management services to high-net-worth individuals, their families, and business owners.

Our team of highly trained professionals have extensive experience and education in their areas of expertise. What sets us apart however is our total commitment to our client relationships. We simply care more about our clients' success and it shows in our industry leading client retention and rapid growth as a firm.

We carefully design strategies and solutions to meet our clients objectives - such as long-term capital growth, retirement income planning, asset protection, or minimizing taxes - and then work closely with some of Utah's most prestigious financial and investment firms, attorneys, accountants, and other advisors to execute the plan. Additionally, our team is constantly searching for innovative strategies and cutting edge products that are generally unavailable to most consumers.

VisionTree was created in 2017 with the goal of bringing a truly unique planning experience to the public. Our entire process focuses on the client relationship. We bring understanding and compassion to the table as we teach correct principles through our values based planning model. We invite you to come and learn that there is a different and better way, that traditional financial planning in America is seriously flawed, and that "Modern Portfolio Theory" is anything but modern. We are glad you're here!

OUR PARTNERS



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