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# MERCER PARTNERS WEALTH MANAGEMENT

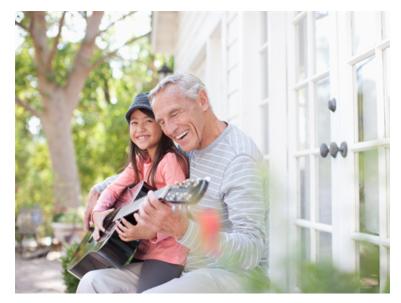
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Account Login
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# "Someone is sitting in the shade today because someone planted a tree a long time ago."

- Warren Buffett

# Where do you want to go? We'll get there, together.

Our first priority is helping you take care of yourself and your family. We want to learn more about your personal situation, identify your dreams and goals, and understand your tolerance for risk. Long-term relationships that encourage open and honest communication have been the cornerstone of my foundation of success.



### Our History

Years of experience have prepared us to guide you through your life transitions.





### Six-Step Process

Mercer Partners Wealth Management uses a widely accepted Six-Step financial planning process: Discover, Evaluate, Analyze, Create, Implement, and Monitor.

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### Shared Values

Trust. Honesty. Integrity. We believe values matter, and we live by ours everyday.



# Life Transitions

Transitions are a part of life. The help of a professional financial guide allows you to understand your options even during the most difficult of times.

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# Words of Wisdom

"An investment in knowledge pays the best interest."

Benjamin Franklin



## Welcome to the family

Our team of professionals have years of experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you.





### Our goals are your goals

Our team of professionals have years of experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you.

LEARN MORE

Meet Our Experienced Team



Don Faul, CFP®

Managing Director, CERTIFIED FINANCIAL PLANNER™

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### Jeremy Olen, CFA

Chief Investment Officer, Strategic Wealth Advisors Group



### Karla McQuain

**Client and Community Services** 

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### Joelle Craker

**Client Operations** 



#### Marci Adams

**Client Services** 

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Chad Faul



### Hao Dang

Vice President, Portfolio Consulting, Strategic Wealth Advisors Group

## Where do you want your financial roadmap to take you?

Our first priority is helping you take care of yourself and your family. We want to learn more about your personal situation, identify your dreams and goals, and understand your tolerance for risk. Long-term relationships that encourage open and honest communication have been the cornerstone of my foundation of success.

### Have a Question?

Name

#### Phone

#### Question

#### **SUBMIT**

Contact

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