



Summit Financial Strategies, Inc.

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Summit Financial Strategies

Our clients interests always come first - People who wish to plan prudently for their financial future but are...too busy...don't feel they have the knowledge or expertise...or simply don't have the desire to manage their own investment portfolios.

We listen and understand - help visualize and vocalize what the client is really trying to accomplish - we then create a financial blueprint that gives them control in achieving their long-term objectives.

As this is designed for a long-term relationship, Summit Financial Strategies shoulders the responsibilities of how a portfolio, retirement plan or trust should be invested. We construct a comprehensive strategy tailored to meet each client's individual needs by selecting investments to harmonize with financial objectives.

We believe a team approach is the best way to provide financial services our clients need and require - We strongly urge each of our clients to introduce us to their tax and legal advisors so we can work along with these other professionals - as a team.

The result - Sound financial planning advice regarding taxes, investments, retirement, estate planning and asset protection. This provides a high quality service by continuously guiding the client over the entire course of reaching their goals.

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