Are you always thinking,

"I REALLY NEED TO ORGANIZE AND TAKE CONTROL OF MY PERSONAL FINANCES."

This is my expertise, we can do this!

GET STARTED HERE

Confidence, patience, and perspective are required convictions for successful long-term investors. There is no other way.

My job is to empower clients to make sound financial decisions and to help them reach their version of a successful financial future. Selecting an advisor is of critical importance when planning for your future. You want to be sure you are picking the right person and team for the job–an advisor that is giving you advice for the right reasons. Before working with us, many people have completed only piecemeal financial planning. They have some life insurance, a few scattered investment accounts, employer-sponsored benefits and a retirement plan (401k, 403b) They may have a basic will and a few loosely defined financial goals, but they aren't sure if they are on the right track to meet them. We assess individual situations to establish a game plan specific to your current standing and future goals.

We often provide specific advice or reviews of the following: wills, trust agreements, stock option agreements, private partnership investments, retirement plans, education savings plans and assisting with gifting/charitable strategies. Our conversations cover areas such as:

- Current financial plans and goals
- Asset and investment management
- Organization and consolidation of accounts
- Cash-flow and expense management
- Pre and post retirement income
- Retirement plan distribution strategies
- Small business retirement plan design and implementation

Read more about our services here.

Matthew Peck is a financial advisor with a genuine, authentic approach to investment and retirement planning. Matt is part of an advisory practice of Amicus Financial Advisors and focuses on serving Texas Tech and others in the West Texas community.

The client experience is different with an advisor who is independent of a large financial institution because the choices for you are not driven by sales commissions or bureaucratic decision-making. Instead, the best selection of investments and services is suited specifically to you. Through clear plans and excellent communication, you come to understand how and why each choice was made with the goal of moving you closer to reaching your goals.

Read a letter from Matt here.

Amicus Financial Advisors, LLC, is a registered investment advisory (RIA) firm providing a full range of financial planning and investment advisory services.

Our services include the development of comprehensive financial plans and ongoing financial advice. As your financial advisors, we act as your navigators, guiding you through the financial services world to keep you on track to attain your life goals. Learn more about Amicus at www.amicusadvisors.com.

Independence is the spirit that drives our innovation and entrepreneurship. We are responsible for our decisions and are directly accountable to each client. In a sea of financial confusion, we are guided by a set of principles that define our character and culture– the convictions that are a fundamental strength to our business.

You can expect to receive excellent service and be in regular communication directly with your advisor. Matt is a Partner and Client Advisor at Amicus. Partners at the firm share responsibility for making sure every client has an excellent experience. Meetings you schedule are for your benefit and at your convenience. We take great pride in the work that we do and the people that we serve. Contact Matt at mpeck@amicusadvisors.com or 806.370.1530

Get in touch.

* Indicates required field

Name *

First

Last

Email *

Comment

SUBMIT

Check the background of this investment professional on FINRA's BrokerCheck.

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