

Celebrating 30 years of Personal Wealth Management

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Your Vision. Our Guidance.



SUMMIT FINANCIAL CONSULTANTS

Re-inventing Financial Decision-Making

sum·mit/'səmət/

noun: The highest point of attainment or aspiration. Meeting the sum of one's desired goals.

Wealth Synonyms: exceptional service, specialized, lifelong-relationships, trust, loyalty, transparency, teamwork

Our mission is to empower our clients with the knowledge and resources needed to simplify their life by providing clarity, direction and confidence in order to take control of their financial future.

CLARITY

Clarity of purpose

Empowering our clients with the knowledge and resources necessary to simplify their life and maximize their financial future.

DIRECTION

Direction in knowing the actions you need to take

Turning apprehension into anticipation. We take a comprehensive view of your complete financial picture to develop a deeper understanding of what is required to achieve your goals.

As your financial advocate, we feel our value is where the end goal exceeds beyond choosing investments and into the realm of true strategic wealth planning. Every aspect of a client's financial life is one piece of the whole puzzle. "The **Summit Approach**" is built around a team that will be there to help you focus on **wealth planning, wealth discipline and wealth guidance.**

CONFIDENCE

simplicity & expertise beyond the average wealth planner. Also by coordinating with our clients selected team of professionals or utilizing our strategic partnerships to implement unique wealth management and advanced estate planning needs for high-net worth individuals.

Our team approach keeps you focused on where you want to go, guides you on how to get there, and continually remind you of the importance of maintaining a disciplined approach in order to realize your dreams.

Contact us now to speak with a Financial Advocate

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Summit Financial Consultants, Inc. - Disclosures (Click Below)

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 Powered by Twenty Over Ten