

The Financial
Freedom to Do
What Brings You
Joy

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Our Mission

“To create, build, and manage wealth so our clients are free to pursue life’s most important endeavors.”

Building wealth isn’t about money. It’s about your values. It’s about your ability to live your life according to what’s most important to you. Because when you have the resources to do so, you’re free to pursue the things that bring you joy.

A Sample of our Institutional Clients

WEALTH MANAGEMENT

RETIREMENT PLANNING

We begin by asking what's most important to you, because our primary goal is to help you plan a future of your own choosing. We'll help you develop and manage financial strategies that provide security and freedom, so you can pursue what means the most to you. Our focus on independence and fee-only management helps us advise you without bias. Working hand-in-hand with Soltis and your other trusted professionals, you'll build and manage wealth that supports what you want most in life. [More Info >](#)

See if we're the right fit



Learn how our advisors help create an experience for our clients that is independent and non-conflicted.

Independence and Fee-only
Management

About Soltis Advisors

To us, freedom means living the life you choose. That freedom means more to you – and to us – than wealth management or retirement. Living a life that brings you joy is the ultimate goal; we’re just here to help you build the resources to support it. We do so through our proprietary process of analyzing investments. This process minimizes conflicts of interest, so that everything we do is focused on what’s most important to you. Our fee-only structure means our recommendations are unbiased and based only on what you want out of life. And when we advise you on retirement planning for your small to medium-sized business, we do so without any third-party relationship to cloud judgement about what is right for you.

The Soltis Investment Advisors, LLC logo is a green Möbius Strip sprayed with light.

A Möbius Strip is a surface with only one side and one edge. If you draw a continuous line starting anywhere on the surface, the line will extend along the entire surface and return to where it began. At Soltis, this represents two things. First there is only one side, our clients side, and we always do what is in the best interest of our clients. Second, travelling along the Möbius Strip represents a never ending journey, which reminds us that creating, building, and managing wealth is a long-term venture, requiring consistent execution over time. By developing enduring relationships with our clients, Soltis becomes a partner in accomplishing your life’s most important endeavors.



SOLTIS

Investment Advisors

The color green represents stability, balance, growth, life, wealth, safety, vibrancy and harmony which are characteristics that we strive for our clients to achieve in their life. At Soltis, we understand wealth is a responsibility that, when managed well, brings great benefits not only to its bearer but also to those the bearer chooses to assist, creating a fertile garden of growth and abundance in a world full of discord and hardship.

Building Your Future on the Foundation of Our Past

Soltis Advisors was founded on one principle: to provide advisory services to



clients in a fiduciary capacity. Since our founding in 1993, we've continued to build on that foundation of doing what's right for you, without the typical conflicts of interests found at other financial firms (e.g. brokerage commissions, fee sharing and financial product fees).

To create, build, and manage wealth so our clients are free to pursue life's most important endeavors

In the fall of 1992, Lon Henderson was invited by his good friend, Hyrum Smith (founder of Franklin Covey) to manage the wealth generated by taking his company public. Hyrum invited Lon to leave his current employment with a renowned money management firm to become the “gatekeeper” of his family’s wealth.

Although intrigued and flattered by the offer, Lon wanted to do more than serve a single client. So he designed a firm based on a business model that was unique within the financial services industry, “fee-only”. Joined by Hal Anderson, the firm became a fiduciary to its clients which meant all investment advisory decisions would always be made in the best interests of its client. This remains the core principle of Soltis today.

Today, led by the executive leadership of Lon Henderson, Hal Anderson, Tyler Wilkinson, Kim Anderson, Clark Taylor, Tyler Finlinson and Brent Moore, Soltis serves clients throughout the continental U.S., providing advisory and investment management services to more than four billion dollars for retail, institutional, public and private clients.

This presentation is limited to the dissemination of general information pertaining to Soltis Investment Advisors, LLC (“Soltis Advisors”) investment advisory services. Soltis Advisors is an SEC registered investment adviser with its principal place of business in the State of Utah. The information contained herein should not be construed as personalized investment advice and should not be considered as a solicitation to engage in a particular investment strategy. Past performance is no guarantee of future results, and there is no guarantee that the views and opinions expressed in this presentation will come to pass.

Get to Know Us

View All	Advisors
Managing Partners	Salt Lake Office
St. George Office	

Recent Recognition



Ranked 7th Registered Investment Advisors



Top 401 Retirement Plan Advisors



CEFEX Certified Advisor



Named Among Top 150 RIA Firms



300 Top Registered Investment Advisors



Named Among Top 1,200 Financial Advisors

What's Most Important to You? Reach Out and Let Us Know.

The world of wealth management, investing, and retirement planning can be overwhelming. But it doesn't have to be complex if you focus on the right things. At Soltis, we want to know what's important to you, so we can evaluate or begin your financial planning based on those values. As we discover what you want most out of life, we can design financial strategies to help you achieve it. It all begins with a brief consultation. Schedule yours now, and we'll call you at a time that's right for you.

Call us today at: 800-735-1601



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Let's Have a Conversation

We look forward to helping you build the resources to do what you love from our offices in Salt Lake City or St. George, UT. You can also call us from anywhere nationwide at:

800.735.1601

Name

Email Address

Phone

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