



## BEST IN CLASS SERVICE, REAL RESULTS

At Summit, our commitment to exceptional service started the day we were founded, and it remains at the center of all we do.

We are proud of the lifelong relationships we maintain with our clients. Whether it's a strategic discussion that puts a savings plan into motion, the ongoing management of your hard-earned money, or the management of distributions in retirement, we systematically care for your wealth.

## CONFIDENCE, COMFORT, AND CLARITY

We help you reach your financial peak through financial planning, investment management, and business solutions.

With every step, we share risks and benefits. Through various forms of communication and

published works, we keep you up to date on what's happening with your own investments and the financial world around us.



## WHO IS SUMMIT WEALTH?

Founded in 1982, we are an integrated team of financial experts who care for your wealth, so you can focus on what matters to you.

It's our privilege to work with second and third generations of families. Our clients are our top priority. They are the reason we do the work we do.

## OUR TEAM



**AMANDA E. PATE, CFP®**  
SENIOR RELATIONSHIP  
MANAGER

**JASON PR**  
CO-PRESID

[Learn More  
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advisory-team/\)](https://www.mysummitwealth.com/financial-advisory-team/)

# VALUE OF SUMMIT

WE TAKE OUR ROLE AS TRUSTED FINANCIAL ADVISORS SERIOUSLY. WE ARE OBLIGATED ONLY TO OUR CLIENTS. WE OFFER UNBIASED, REAL SOLUTIONS THAT IMPACT THE LONG TERM.

## LIVING A WELL INFORMED FINANCIAL LIFE

FOR OVER 30 YEARS, OUR PRIMARY GOAL HAS REMAINED THE SAME, TO PROVIDE OUR CLIENTS WITH CLARITY AND CONFIDENCE WHILE BUILDING CUSTOMIZED SOLUTIONS DESIGNED TO CONTINUALLY WORK FOR THEM.

### OUR SERVICES



[\(https://www.mysummitwealth.com/wealth-management/\)](https://www.mysummitwealth.com/wealth-management/)

#### WEALTH MANAGEMENT

Wealth management is much more than investment management. It is a comprehensive, premium service that uses custom-designed strategies to meet your unique goals and needs.

[Learn More](#)

[\(https://www.mysummitwealth.com/wealth-management/\)](https://www.mysummitwealth.com/wealth-management/)



[\(https://www.mysummitwealth.com/financial-planning/\)](https://www.mysummitwealth.com/financial-planning/)

#### FINANCIAL PLANNING

You deserve a well-constructed, rock-solid financial plan with clearly defined steps for implementation and successful outcomes. Ever-changing laws and regulations make comprehensive financial planning critical to success.

[Learn More](#)

(<https://www.mysummitwealth.com/financial-planning/>).



(<https://www.mysummitwealth.com/solutions/>).

## **BUSINESS SOLUTIONS**

Summit offers business owners a variety of services designed to increase revenue and help avoid or fix critical and costly issues with 401(k) plans. We can also help with long-term success and succession planning, enabling the next generation to become tomorrow's leaders.

[Learn More](#)

(<https://www.mysummitwealth.com/solutions/>).

## **SUMMIT INSIGHTS**

### **Our Blog**

#### **THE DAWNING OF THE AMAZON EFFECT**

The Amazon Effect is a term created to describe the ongoing evolution and disruption of retail markets, due to an increase in e-commerce. As Amazon has grown, its effect over a vast array of products, and both physical and online retail, is astounding. The term itself, "Amazon Effect," is an acknowledgment of Amazon's continuing domination of all facets of the retail environment.

[Learn More](#)

(<https://www.mysummitwealth.com/dawning-amazon-effect/>).



#### **SUMMIT SOCIAL SECURITY SNIPPETS**

8 Tips to help you get the most out of your  
Social Security benefit:

**Earned & Entitled**

To obtain Social Security credits, the Social Security Administration reviews the amount of money you earn from work for which you have paid Social Security payroll tax. You must work for at least ten years and earn a minimum of 40 credits.

[Learn More](#)

[\(https://www.mysummitwealth.com/summit-social-security-snippets/\)](https://www.mysummitwealth.com/summit-social-security-snippets/)

## **THE RISKY BUSINESS OF STABILITY**

We've had a remarkable recovery since the Great Recession of 2008 and 2009. The markets have been on a bull run for over nine years now. The Dow Jones has had its longest and most significant recovery since World War II. The S&P 500 is likewise having its second longest and largest recovery since the technology rally of the nineties.

[Learn More](#)

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