SUMMIT WEALTH & Retirement Partners

GUIDING YOU TO YOUR FINANCIAL DESTINATIONS

FEE-BASED FINANCIAL PLANNING & WEALTH MANAGEMENT give you peace of mind and empower you to live the life you want to live. Put simply, our job is to help you make better financial decisions.

LEARN ABOUT WHAT WE DO

Retirement Planning

Investment Management

Multi-Generational Wealth Transfers & Estate Planning

Tax Planning

Charitable Giving Guidance

WHAT DOES THIS LOOK LIKE?

What To Expect

Get to Know Our Process

Exactly What I Was Looking For

Let’s Have a Conversation

Who We Can Help

Case Study – Mitch & Debbie

Case Study – Nancy

Case Study – Marco

Case Study – Cody & Tracy

Some light (and not so light) reading you might find useful.

April 4, 2019

REAL RETIREMENT ADVICE

September 7, 2018

A RETIREMENT INCOME PLAN

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FINANCIAL PLANNING