



# TRITON

## WEALTH MANAGEMENT

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# A wealth of opportunities

Reach your goals with personalized financial guidance

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## Our story

At Triton, you're not just a client. You're a partner. We share your values and strive to have a complete understanding of your goals. We're here to level the playing field for the average investor. Let our team help you navigate the ups and downs of an unsteady market.

Our clients include family trusts, professionals and entrepreneurs, retired individuals, and young professionals.

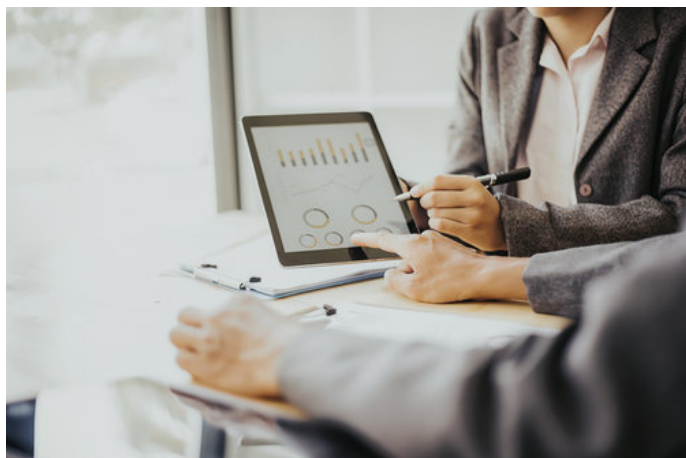


# Services

## Building your portfolio and your wealth.

We know the amount of trust it takes to hand someone your life savings and let them manage it for you. It's not easy, and it shouldn't be. The market is a dynamic arena, with endless strategies to choose from. Whether you're nearing retirement or just starting out in your career, we are dedicated to helping our clients negotiate the complexities of personal finance.

We will talk to you about your vision, present the strategies we feel are best suited for your goals, and keep the lines of communication open as the market changes.



## Retirement

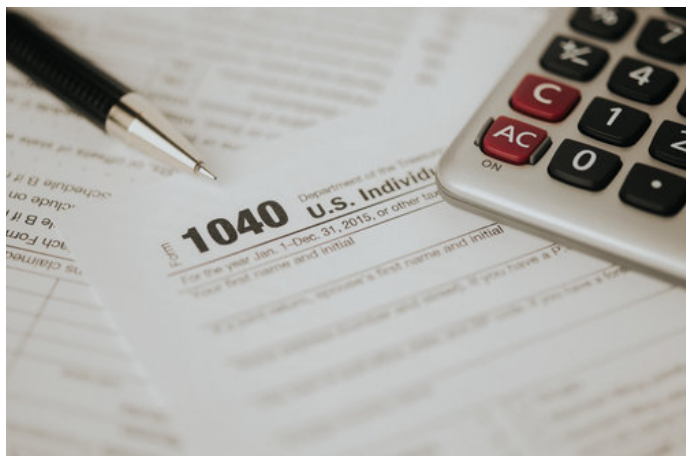
PREPARING FOR THE GOLDEN YEARS

Retirement can be daunting when not planned for correctly. We'll start a retirement plan that will meet the goals you visualize through your retirement years.

## Investments

STRATEGIZING IN THE MARKETPLACE

Through academic research and modeling, we understand what drives investment performance and returns. Based on that knowledge, we'll design a customized solution tailored to fit your risk tolerance and needs.



## Estate planning

## Tax planning



## LEAVING YOUR LEGACY

Estate planning and creating a legacy are on the top of most retirees' minds. Estate planning is the art of making sure your loved ones still talk to each other after you pass on. Leaving an unplanned estate can destroy even the strongest families. Make sure you take the time to incorporate this important element into your comprehensive retirement plan.

## A NECESSARY EVIL

Tax planning is often a forgotten part of retirement planning, but it is an important step when planning for your future. We'll build a tax plan into our strategy and get in touch with certified CPAs we trust to help you navigate those waters.



We're in your  
neighborhood

Located in sunny Phoenix, AZ.

We also work remotely with clients from all over the country.

