



SUMMA GLOBAL ADVISORS, LLC

Planning your path to prosperity.



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sms: 503-966-9456

INVEST
WITH A
GLOBAL
PERSPECTIVE.

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PLAN
NOW
FOR
YOUR
FUTURE.

FINANCIAL & RETIREMENT PLANNING



From the basics to sophisticated, long-term planning, we have it covered and we make it simple. Most of

WEALTH MANAGEMENT



Whether you're still building or are where you want to be, we will be there every step of the way to take it to the next level.

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INVESTMENT MANAGEMENT



You don't need to feel overwhelmed or intimidated by the sea of products out there. Leave the hard part to us.

us only retire once – make it memorable.

[Find Your Risk Number](#)

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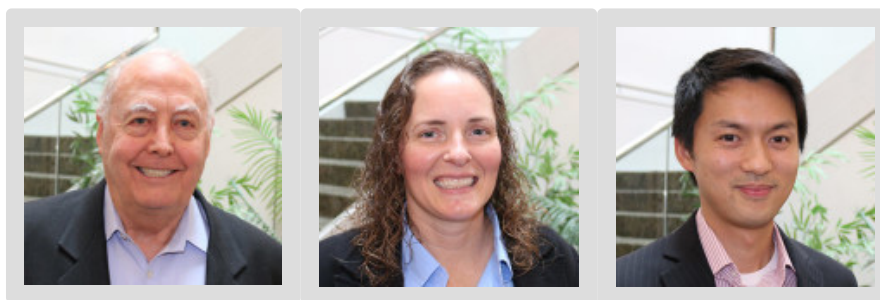
Synergy: You talk, we listen.

Our goal is to get to know you by listening and coming to an understanding of your concerns, needs and wants, not just as advisors but also as family members. Only then will we create strategies to tackle the problems. We build trust by asking the right questions, giving honest, unbiased advice and nurturing long-term

Now is the Time to Invest in Your Future.

CONTACT US TODAY

Our Financial Team



Roger L. Johnson

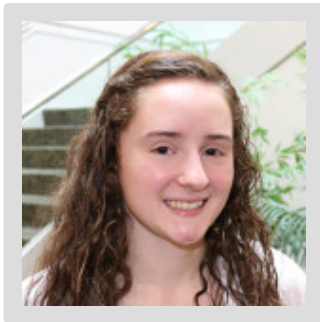
Founder &
Relationship
Manager

Rachel Wakefield,

CFA
Managing Member
&
Portfolio Manager

Henry Yu,

CFP® AEP®
Managing Member
&
Portfolio Manager



Valerie Wakefield

Assistant Portfolio Manager

More Than 90 Years of Combined Experience.

Quarterly Perspective Newsletter



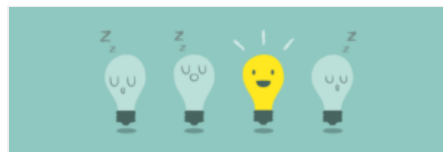
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APRIL 1, 2019 BY **ROGER JOHNSON**

CONTACT INFO

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