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# ROCKY MOUNTAIN FINANCIAL, L.L.C.

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☎ 406-542-7718

## Rocky Mountain Financial, LLC.

Clients Come First

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## **Our Process**

We create strategies that are tailored to your needs and goals.

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## **Our History**

Years of experience have prepared us to guide you through your life transitions.

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## **Our Values**

Trust. Honesty. Integrity. We believe values matter, and we live by ours every day.

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## **Understanding Today's Financial Environment**

Our approach to delivering comprehensive financial services always starts and ends with you, our clients. We begin this process by listening to you and discussing your lifestyles, goals, wishes, dreams and family situations. Through a consultative process we then learn the details of your financial picture so we can construct and deliver a customized plan along with your personal Financial Action Checklist. Our experienced team of professionals fully evaluates your situation to prepare personal solutions that integrate investment planning, tax reduction planning, retirement income and distribution planning, and family wealth planning.

We then schedule to meet with you on a regular basis to discuss and update your financial situation. We pride ourselves in our constant calendars of client services and regular client communications to keep you informed of economic news and appropriate tax law and estate planning rule updates. As we said earlier, at Rocky Mountain Financial, clients come first!

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## Your Financial Future

Today's economic environment presents many challenges. But along with these challenges comes opportunities and potential rewards for those who can identify long-term trends.

Whether you're facing retirement—or looking to better understand certain investment ideas—we can help you address your most pressing financial questions.

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*"Remember, what does 'retirement' mean? It doesn't mean that you're a couch potato. Leisure is not the same things as rest. If you're bicycling five miles a day, that's leisure, but it certainly takes a lot of effort."*

**Robert Fogel**

## Have a Question

Name

Email

Message

**SEND**

### Contact

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