



PRESIDIO WEALTH MANAGEMENT

Comprehensive Wealth Management in Salt Lake City, Utah

When it comes to investing, building and preserving wealth isn't the end goal. Rather, it offers you the opportunity to create meaning and purpose in your life, from sending your children to college to enjoying your hard-earned retirement years.

We are Presidio Wealth Management, an independent financial services firm in Salt Lake City, Utah. We created our firm more than a decade ago with the desire to build enduring relationships, and to simplify and preserve your finances so you can pursue and focus on your passions in life. We strive to go beyond the service level of the typical wealth management firm and serve as a trusted guide on which you can rely for honest recommendations, a disciplined investment approach, and education tailored to your questions.

Offering comprehensive wealth management, we specialize in working with small businesses, affluent families, and medical professionals. We seek to inspire clients to make well-informed decisions and help them realize that their hopes and dreams are just a plan away.

We are located at 6967 South River Gate Drive, Suite #102, Salt Lake City, Utah, 84047. We largely work with clients throughout Utah, including Salt Lake City, Provo, and Ogden. **Experience the difference of a personalized partnership to manage and help preserve your wealth, and call us today.**

Helpful Content



18 Years Worth of Days

The average retirement lasts for 18 years. Are you prepared to fill that many days?



Revising Estate Strategy Assumptions

Estate tax exemptions rules appear to be stabilizing, prompting many to reconsider conventional estate strategies.



“Dirty Dozen” Tax Scams to Watch For

Every year the IRS releases its list of tax scams, spotlighting some ways that people try to separate you from your money.

Articles

Calculators

Presentations

Videos



Contact

Office: (801) 290-3201
Toll-Free: (833) 387-7005
Fax: (801) 416-1850
parker@presidiowealth.com

Check the background of your financial professional on FINRA's [BrokerCheck](#).

The content is developed from sources believed to be providing accurate information. The information in this material is not intended as tax or legal advice. Please consult legal or tax professionals for specific information regarding your individual situation. Some of this material was developed and produced by FMG Suite to provide information on a topic that may be of interest. FMG Suite is not affiliated with the named representative, broker - dealer, state - or SEC - registered investment advisory firm. The opinions expressed and material provided are for general information, and should not be considered a solicitation for the purchase or sale of any security.

Copyright 2019 FMG Suite.

Securities offered through Triad Advisors, member [FINRA/SIPC](#). Investment advice offered through Resources Investment Advisors, Inc., an SEC-registered investment adviser. Resources Investment Advisors, Inc. and Presidio Wealth Management are not affiliated with Triad Advisors.

The registered representative(s) associated with this site may only discuss and/or transact securities business with residents of the following states: Utah, Idaho, Nevada, Texas, Florida, North Carolina, Washington and Oregon.

Contact

Presidio Wealth Management

Office: (801) 290-3201

Toll-Free: (833) 387-7005

Fax: (801) 416-1850

6967 South River Gate Drive

Quick Links

[Retirement](#)

[Investment](#)

[Estate](#)

[Insurance](#)

[Tax](#)

[Money](#)

Suite #102

Midvale, UT 84047

parker@presidiowealth.com

Lifestyle

All Articles

All Videos

All Calculators

All Presentations