

Next Generation Wealth Management

Planning Reimagined

Most advisory firms exclusively serve clients in or near retirement with substantial assets — and for good reason. The importance and complexity involved in creating a solid financial strategy for 30+ years of life in retirement has driven our industry since its inception. However, there is an entire generation of investors at the start of their planning journey that have been overlooked.

Absent a caring and competent advisor, the next generation of investors is left on their own to sift through the myriad of Robo-investment providers, web-based insurance vendors, and various lending institutions to piece together a strategy. While inexpensive, that path is lacking the coordination and mapping needed to encompass the entirety of their financial lives.

Summit holds a fundamental belief that the best advice comes from a coordinated and thoughtful plan that evaluates all areas of one's financial life before allocating resources to any financial product. As a result, we have created ***The NextGen Path***.

We offer comprehensive advice to a younger generation of investors for an affordable price, without regard to asset size. A few smart moves in your 20's and 30's combined with the power of compound interest can make a dramatic difference in your financial future.

It All Starts with a Conversation

At Summit we understand that everyone's path is unique. Your financial journey is different than the generations that came before you. The NextGen Path is designed to cater to you where you are right now.

There is no singular plan that works in every situation. We take the time to get to know your story and what matters most to you. We work with you to uncover the goals you want to achieve. Maybe your dream is to invest so you can retire early. Maybe it is buying your first home. Or maybe you simply want to pay off student loans or need help constructing your budget … whatever you strive to accomplish, we can help you get there. And as you grow your family, your income, your goals, we are there every step of the way to adjust your plan and keep you on track.

The Summit Difference

Here's what you can expect ...

- **Personalized,** comprehensive planning that helps you define and achieve your short- and long-term financial goals.
- Access to **cutting-edge software** from your laptop or mobile device that lets you see the big picture and manage all your accounts in one place.
- Straightforward, **transparent pricing** – no hidden fees.
- Unlike Robo solutions, we offer an annual plan review with a **dedicated advisor** in our office or via Zoom technology to help you stay on target.

The First Step Toward Your Future

The world moves quickly. A financial roadmap can lead you to where you want to go, and we can help you get there. Spend more time doing what you love and less time worrying about your future. Call us today.

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