OUR MISSION

Our mission is simple: We are committed to providing independent, objective advice to people at all stages of life. Through the advantages of competent, professional planning, we seek to empower our clients to make the best financial decisions possible.

OVERVIEW

Peak Financial Partners, LLC provides financial advisory and planning services on a discretionary and non-discretionary basis as stated in the investment advisory agreement. We manage portfolios for individuals, retirement accounts (IRAs, etc.), trusts, estates, charitable groups, and corporations or other business entities. Each portfolio is customized to your specific risk tolerance, time horizon and specific goals.

Richard Roell - President and CEO
Chartered Financial Consultant – ChFC
Fellow, Financial Services Institute – FFSI
Home/Auto/Health Insurance Agent

Peak Financial Partners
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AVAILABLE SERVICES

Peak Financial Partners
Registered Investment Advisor

COMPREHENSIVE FINANCIAL SOLUTIONS

- **Retirement Planning**
- **College Savings**
- **Tax Strategies**
- **Business Enhancement and Continuation**
- **Estate Preservation and Transfer**
- **Employee Benefits**
- **Life, Health and Long Term Care Insurance**
- **Auto and Home Insurance**
- **Ongoing advice and assistance on personal financial matters**

Full-Service Financial Planning

First and foremost the plan we create is for you. As a Registered Investment Advisor, Peak is aligned with your interests. We are a fee-only advisor. Client assets are held at a large, independent custodian. Peak does not receive commission or fund fees without the client's prior knowledge and is independent for your benefit. We have a fiduciary duty to act in your interest as we work toward your financial success. Your plan is comprehensive so you have a roadmap to follow; and it is updated as you travel through life.

Types of Full-Service Plans and Analysis Available

All plans are based on your risk tolerance and all available data provided by the client. Your plan is customized based on your current financial information such as investments, mortgages, college savings, and retirement funds. Optimally, to stay focused on your goals an ongoing relationship is best. However, we welcome the chance to assist you with a onetime plan as well.

Plans include:

- **Current Personal Goals and the ability to meet them**
- **Helping you create a budget to achieve your goals**
- **Retirement Income Needed**
- **Insurance Needed**
- **Estate Planning**

We help to ensure your plan will succeed by providing the following:

- **Quarterly or Annual updates to ensure you stay "on track"**
- **What if scenarios**
- **Stress testing the plan**
- **Monte Carlo Simulations**

A report is provided quarterly or annually based on your request.

CUSTOMIZED WEALTH MANAGEMENT

We provide:

- **Goal-specific investment plan**
- **Independent institutional money management**
- **Continual management and oversight of portfolio**
- **Timely updates and ongoing communications**

Are your investments growing at a rate that will allow you to achieve what you want out of life? Do you have scattered accounts (possibly from a former employer) without knowing the overall impact of those to your goals? Our team builds a portfolio of investments specific to you and your risk tolerance.

The types of accounts we manage are:

- **Investment portfolios including IRAs and trusts**
- **401k, 403b, and 457 plans**
- **529 plans – College Savings**
- **Annuities**
- **Life insurance investment vehicles**

All clients have the ability to access their accounts 24/7 to see the current value of their investments.

It's simple to get started.

Call our office today at 614-542-7242 and we will meet with you to create a personalized plan.