Michelle A. Clary

CFP®, ChFC®, CLU®, RICP®, AEP®

CEO, SENIOR WEALTH ADVISOR

11257 W. Clearwater Ave., Ste. 110
Kennewick, WA 99336
T: 509-582-0570 | F: 509-582-8422

18 Village Loop Rd
Kalispell, MT 59901
P: 406-756-7797 | F: 406-756-6777
michelle.clary@pitonwealth.com

about MICHELLE A.CLARY

Michelle has been a Wealth Advisor since 2000. Her extensive training and experience as a Certified Financial Planner has led the Piton Wealth team to one of the highest client satisfaction ratings at Thrivent Financial. In 2018, she launched Piton Wealth in Kennewick as a partner with the Thrivent Advisor Network, and in 2020 added an office in Kalispell, Montana. Piton currently serves more than 500 client households, many local and many virtually around the country. Piton was voted Tri-Cities Best in 2023 & 2024 in the Financial Planner category. Other accomplishments and recognition include:

- developing Thrivent's Accelerate program (practice management training series for financial advisors)
- developing the Navigated Journey™, a unique planning process for comprehensive financial planning with clients
- Thrivent Charitable's VIP-Hall of Honor (has facilitated more than $35 million in client charitable gifts)
- long-standing volunteer and fundraiser for Habitat for Humanity (Invest in Others Honorable Mentions 2022 & 2023)
- ranking as an Advisor to Watch! in 2022, 2023 & 2024 by AdvisorHub magazine.
- marriage to husband Andy for 25 years & two sons (ages 18 & 20)
- avid for tennis, golf, pickleball, downhill skiing, and many outdoor adventures.

previous experience

- Business Analyst for Micron Technology (Boise, ID)
- External Auditor for Arthur Andersen (Queretaro, Mexico)
- Commodities Trader for Cargill (Tampa, FL)

education | designations

- University of Idaho: Bachelor of Arts in Foreign Languages
- CERTIFIED FINANCIAL PLANNER™, CHARTERED LIFE UNDERWRITER™, CHARTERED FINANCIAL CONSULTANT™, RETIREMENT INCOME CERTIFIED PROFESSIONAL™, ACCREDITED ESTATE PLANNER™
- Executive Education, Stanford University Graduate School of Business
- Executive Education, University of Pennsylvania Wharton School of Business

connect: pitonwealth.com | facebook.com/pitonwealth | linkedin.com/in/michelleaclary