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pitonwealth.com

PITON WEALTH

ABOUT our PRACTICE

Clients often find so much value in The Navigated Journey™ that they want to share us with family and friends.

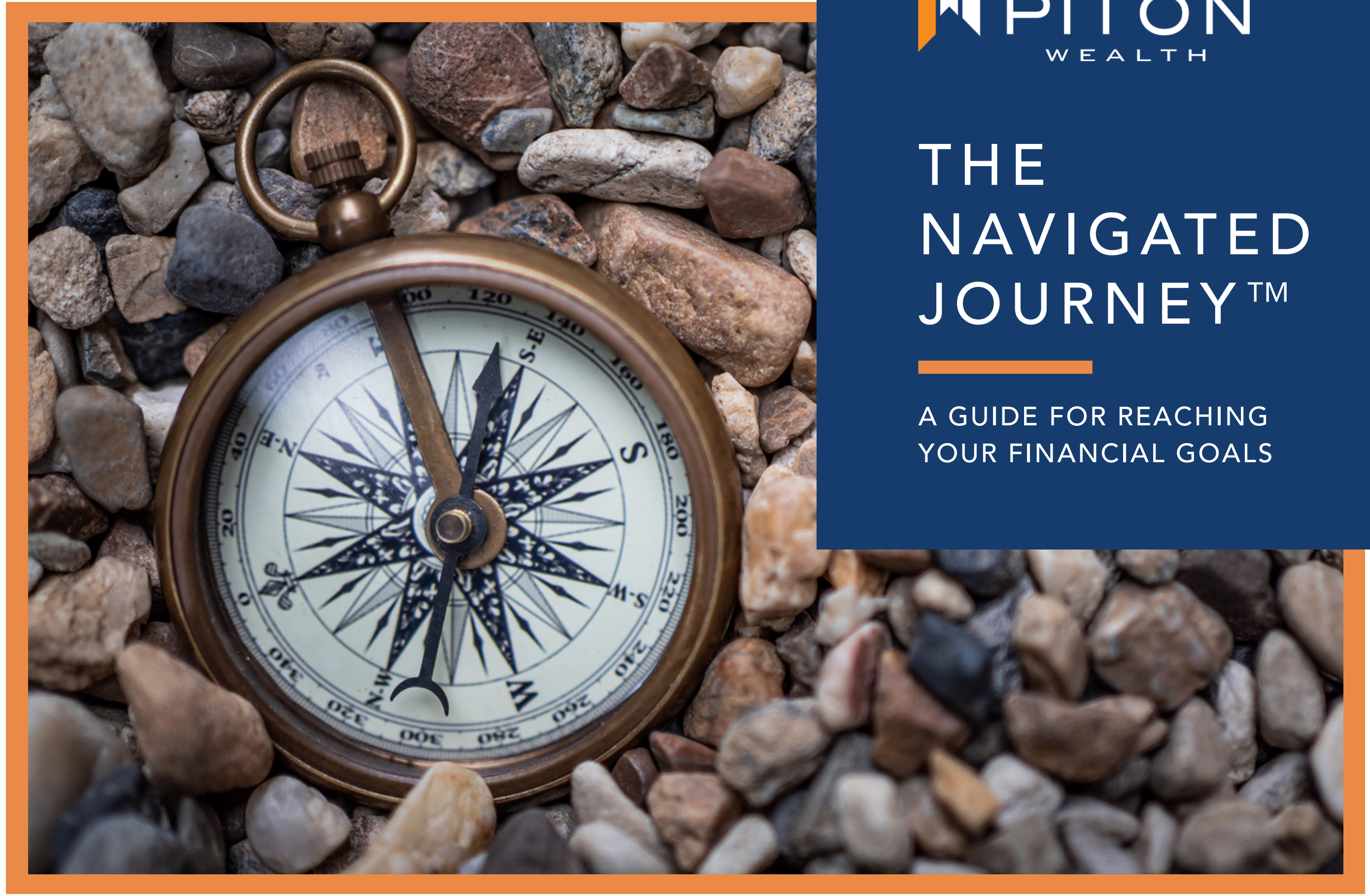
At Piton Wealth, we help people simplify the complexity of wealth by giving them a plan and expert guidance, so they can make informed decisions and be intentional about reaching their financial goals.

Our wealth advisors specialize in working with high-net-worth families, business owners, and senior executives.

OUR STORY

Piton Wealth originated as a one-woman practice and today is a growing, independent firm respected for its innovativeness and quality of comprehensive financial planning oriented toward holistic wellness.

To explore Piton's process and more online, scan here:



PITON WEALTH

THE NAVIGATED JOURNEY™

A GUIDE FOR REACHING YOUR FINANCIAL GOALS

PLAN with PURPOSE

Set your goals with confidence.

It can be overwhelming to manage all the details of your financial life. With your future at stake, you need a plan and the assurance that you're going the right direction.

Whether your goal is a fulfilling retirement, leisure time with family, a charitable legacy, or simply having enough to live your dream—Piton Wealth can help you plan ahead for the life you want to live. With an expert guide at your side, you'll go farther, faster. And more safely.

Discover the path forward.

Our team gets to know you, your values, and your goals, so we can develop a unique financial plan that's customized for you and your family, with services like:

Cash flow analysis
Retirement planning
Estate planning
Investment planning
Stock options analysis
Protection planning
Tax strategies
Gifting strategies
Education funding
Business planning

Begin your journey today.

Getting started is simple. We give you a planning engagement to sign, a checklist of documents to gather, and an appointment to drop off your documents—virtually or in-person. Then you're ready to begin our four-step planning process, The Navigated Journey™, and start making progress toward your goals.

1	2	3	4
DISCOVER	DESIGN	REALIZE	ACHIEVE
Choose a destination.	*Create a map.*	*Select your path.*	*Climb with confidence.*
Collect your financial details and define your goals.	Design strategies and explore options to reach your goals.	Implement the financial strategies you've chosen.	Review your progress and adjust your plan as needed.
1-HOUR MEETING *2 weeks after we receive your documents*	1-HOUR MEETING *2 weeks after the Discover Meeting*	1-HOUR MEETING *2 weeks after the Design Meeting*	ONGOING MEETINGS *Regular meetings and a formal annual update*