SUMMIT
Investment Advisors

Our 5-Step Process

At Summit Investment Advisors, how we do it matters as much as what we do. Our process is designed to give you clarity and confidence every step of the way.

1

Discovery: Getting to Know You

Understanding who you are, what matters to you, and where you want to go. We'll complete a detailed profile together, discuss your needs and goals, and ensure we understand what success looks like for you. We'll also introduce you to our team, our offices, and our approach so you feel comfortable from day one.

2

Analysis: Understanding Your Complete Picture

A thorough review of your complete financial picture. We'll identify gaps, opportunities, and potential risks. We'll show you the numbers and walk you through our analysis so you understand where you stand today and what needs to happen to get you where you want to be.

3

Plan Development: Creating Your Roadmap

A comprehensive financial plan with clear recommendations. We'll walk you through different strategies, answer every question, and make sure you feel confident in the path forward. You'll leave our meeting understanding not just what we're recommending, but why.

4

Implementation: Putting Your Plan into Action

Smooth, coordinated implementation of your financial plan. We'll handle the details and keep you informed throughout. You'll know exactly what's happening, when it's happening, and what to expect next.

5

Ongoing Monitoring: Staying on Track Together

Proactive, ongoing support. Regular review meetings where we track your progress and make adjustments. Responsive communication when questions arise. Confidence knowing someone is consistently watching over your financial situation and keeping you on track toward your goals.

SUMMITINVEST.COM
651-490-2939
info@summitinvest.com