

THE TEN MOST  
DEPENDABLE™

# Wealth Managers

OF THE  
ROCKY MOUNTAINS

THE COMPANIES  
SELECTED EXCEED  
THE CRITERIA BELOW

Exceptional Client  
References

10+ Years Experience

No Lawsuits or  
Grievances

Signed Fiduciary Oath

Advanced  
Certifications Held

Comprehensive Range  
of Wealth Management  
and Financial Planning  
Services Offered

## Financial Strategies Institute

6955 Union Park Center, Suite 250  
Salt Lake City, UT 84047  
801-316-4100 || [www.fsiplanners.com](http://www.fsiplanners.com)  
*FSI focuses on investment education, tax-efficiency and specific investment strategies, and is a leading provider of wealth and financial services in Utah and the Rocky Mountain area.*

## Integrity Financial Solutions

Wheat Ridge, CO 80033  
303-462-2001  
[www.ifsweb.com](http://www.ifsweb.com) || [imoneycoach.com](http://imoneycoach.com)  
*A fee-based registered investment advisor, Integrity Financial Solutions coaches its clients to develop and master financial skills and habits.*

## Sharkey, Howes and Javer

720 South Colorado Boulevard  
Suite 600 South Tower  
Denver, CO 80246  
303-639-5100 || [www.shwj.com](http://www.shwj.com)  
*This firm's team approach provides the expertise necessary to handle complex issues and inspire confidence. Their client-centered relationships go well beyond managing money.*

## ABG Consultants, LC

A DIVISION OF ALLIANCE BENEFIT GROUP  
3200 South 700 East  
Salt Lake City, UT 84106  
801-486-5069 || [www.consultabg.com](http://www.consultabg.com)  
*With over 27 years experience, ABG Consultants is the wealth, retirement, growth and preservation expert. ABG excels in personalized investment advice and custom corporate retirement plans across the U.S.*

[www.themostdependable.com](http://www.themostdependable.com)

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## Stack Financial Management

2472 Birch Glen, Suite A  
Whitefish, MT 59937  
800-790-5001 || [www.investech.com/sfm.cfm](http://www.investech.com/sfm.cfm)  
*With a national reputation for its "safety-first" investment strategy, SFM services individual clients, corporations, trusts, and retirement plans throughout the United States.*

## The Wealth Conservancy, Inc.

1525 Spruce Street, Suite 300  
Boulder, CO 80302  
888-440-1919 || [thewealthconservancy.com](http://thewealthconservancy.com)  
*Offering TIES® (The Inheritance Empowerment System), which, nationally, enables inheritors to thrive in spite of their wealth.*

## Cornerstone Financial Advisors

1858 East First Street  
Idaho Falls, ID 83401  
208-529-6643  
[www.cornerstonefinancialadvisors.net](http://www.cornerstonefinancialadvisors.net)  
*Cornerstone Financial Advisors is a leading provider of wealth management services to individuals and retirees throughout Idaho and the Rocky Mountains.*

## Peak Capital Investment Services, LLC

640 Plaza Drive, Suite 120  
Highlands Ranch, CO 80129  
303-972-7786 || [www.peakcapital.com](http://www.peakcapital.com)  
*Peak Capital Investment Services provides comprehensive financial services to high net worth investors and companies—solid advice from an experienced team making the right moves with clients' retirement assets.*

## Davidson Investment Advisors

8 Third Street North  
Great Falls, MT 59401  
406-727-6111  
[www.davidsoninvestmentadvisors.com](http://www.davidsoninvestmentadvisors.com)  
*Davidson Investment Advisors provides professional money management to individual investors, corporations, foundations and trusts. They offer multiple investment styles to help clients meet their objectives.*

## Pinnacor Financial Group, Inc.

4101 East Wesley Avenue, Suite 1  
Denver, CO 80222  
303-758-2002 || [www.pinnacorfinancial.com](http://www.pinnacorfinancial.com)  
*Pinnacor Financial Group offers personalized comprehensive wealth management services to successful individuals, families, business owners and executives.*

**415-892-9400**