



## OUR CLIENT SERVICES



### Gary Kiemele

Managing partner of WestPeak Private Wealth, as well as our lead financial advisor.



### Merritt Hicks

Service Advisor and Office Manager

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*“Managing wealth with integrity and purpose”*

### WHAT WE OFFER

- We are a fiduciary, ethically bound to act in clients’ best interests
- An experienced dedicated advisor & staff
- Comprehensive planning
- Wealth management
- Retirement & estate planning
- Life planning
- Business & corporate retirement planning
- Saving & investing for children
- Charitable giving
- Life insurance & long-term care
- Financial behavior coaching to aid you in making smart financial decisions
- Customized tax reporting with Holistiplan™
- Credit Access Lines

### OUR PRODUCTS

- Mutual funds
- Retirement & IRA accounts
- Stocks & trading
- Fixed income, bonds & CDs
- ETFs
- Options
- Sustainable investing
- Managed accounts
- 529 college savings
- Annuities
- Life insurance
- Long-term care
- Checking, BillPay, Debit Cards
- Lines of Credit