



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

1515 South Reserve St.
Suite 200
Missoula, MT 59801
(406) 295-0766
Westpeakpw.com

"Managing wealth with integrity and purpose"

WHAT WE OFFER

- As an investment advisor representative, Gary is a fiduciary and is 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*

* Offered through third party providers.