

# B U S I N E S S P R O F I L E

**PAYANT WEALTH MANAGEMENT GROUP** • Payant Financial Plaza: 1653 Sun City Center Plaza, Sun City Center, 33573  
**813.633.7333** • [PayantWealthManagementGroup.com](http://PayantWealthManagementGroup.com) • Hours: 9a-5p Monday-Friday

# Integral financial services, together under one roof

**W**hen Robyn and Tom Payant first constructed Payant Financial Plaza in the middle of Sun City Center, they envisioned incorporating all financial services pre-retirees and retirees could possibly need under one roof.

Now, nearly 20 years later, the Payants' vision has become reality. At their 8,500 square-foot financial center, the husband-and-wife duo, along with a team of strategic professionals, offer one-stop access to critical financial services, including wealth management and financial planning, tax strategies and income tax preparation, Medicare health-insurance programs, personal and business lines of insurance, estate planning and legal document preparation.

Founded by Tom Payant, **Payant Wealth Management Group (PWMG)** will celebrate its 40<sup>th</sup> anniversary of business this year. A Registered Investment Advisor (not a Broker), PWMG adheres to a strict fiduciary responsibility by making client well-being its top priority. Working together efficiently as a team, the company's staff of specialized professionals – which includes a Certified Financial

Planner® (CFP®), a Chartered Financial Analyst® (CFA®) and three client service experts – can help with your investment planning, retirement cash-flow planning, tax planning, insurance planning (including life, health and long-term care) and estate planning. Since its client accounts are held at Pershing, a BNY Mellon company, PWMG has access to Vanguard, Fidelity, Schwab and hundreds of other top companies.

With a philosophy of avoiding unnecessary risks, PWMG emphasizes capital preservation and providing a balance of growth and income to maintain your lifestyle. "Our ultimate focus is to preserve our clients' lifetime of work and achievement, while strategically helping clients grow their assets and income during good times and preserving them during recessionary periods," Payant explained.

**Payant Tax Services, Inc.** provides tax preparation and income tax planning strategies, with the capability of doing so in all 50 states. **Payant Insurance Solutions, Inc. (PIS)** can help seniors (65 and older) determine whether they should stay on



**Above: Robyn and Tom Payant pose at a White House reception with Governor Ron DeSantis and First Lady Casey DeSantis.**

Medicare or switch to a private provider. Additionally, PIS has partnered with RTI Insurance Services, which offers home, auto, golf cart, boat, flood and umbrella coverage, as well as business insurance.

Also within the Payant Financial Plaza building: Attorney **Joe Phippen**, who offers **estate planning** services in trusts and wills. Phippen is also the host of *Ask an Attorney*, Florida's longest-running radio show.

"Our original vision has come true," Payant reflected. "We're different from other firms since we offer all of these critical services in a single convenient location.

"We consider it an honor and a

privilege to help our clients work on making sound investment decisions that will contribute toward a secure future."

**Take a short retirement survey and learn more at [PayantWealthManagementGroup.com](http://PayantWealthManagementGroup.com). To schedule a consultation, call (813) 633-7333.**

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