



Comprehensive Wealth Management
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Summit Wealth Advisors Story

Summit Wealth Advisors was founded by Kevin Meehan CFP® in 2000 as an independent wealth management firm. Kevin started his career as a Financial Advisor in 1985 with Lincoln Financial Group. Until 1999 he worked in both an advisory and managerial capacity mentoring up to 100 advisors at a time. Prior to his career as a Financial Advisor, Kevin was a special education teacher, and through that experience has focused his career on giving back to his community and delivering education to his clientele.

In February 2000, Kevin partnered with Raymond James Financial Services, Inc. At this time Summit Wealth Advisors was formed as an independent registered investment advisory firm which provides fee based wealth planning services to clientele.

Coupled with Kevin's love for the mountains, Summit Wealth Advisors name was inspired by the definition of the summit being the highest point of attainment or aspiration. Summit's goal is to achieve a level of confidence that a client's financial decisions are aligned and fulfilled with their personal goals and aspirations.

The careers of the Summit team have been guided by our core value system known as the Summit 4 C's. Our approach to the wealth planning process is comprehensive, caring, competent, and conscientious.

Today Summit Wealth Advisors serves a wide range of markets including business owners with growing or maturing companies, senior executives, independent woman, medical professionals, and affluent, emerging affluent and suddenly affluent individuals and families. The team is focused on service to clients and assisting in the achievement of their personal and financial objectives by using a comprehensive and detail oriented approach. Summit Wealth Advisors takes a proactive wealth planning approach with an emphasis on proactive investment management, and client communications.

Securities offered through

Raymond James Financial Services, Inc.
Member FINRA/SIPC

Summit Wealth Advisors, LLC is an Independent Firm
www.summitwealthonline.com