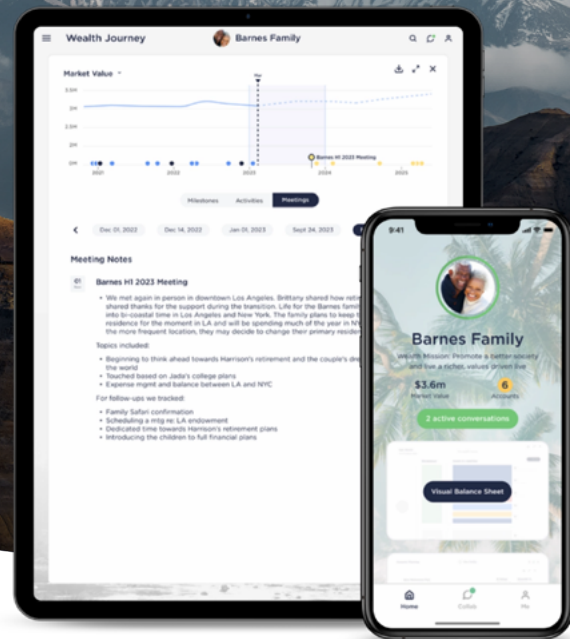




SUMMIT

Advisor technology built from your client's point of view



**BRING YOUR
CLIENT TO THE SUMMIT**

Is your technology struggling to reach its peak?

At Summit, we know what it takes to boost your advice above everything else.

When we set out to create the industry's leading Portfolio Management System, we began with a new perspective. We asked ourselves, "How can we align clients, advisors and enterprises around an impressive, unified experience?" We let the answer guide us: start from your client's perspective and the rest will follow.

ANTITHESIS OF GENERIC

Show your clients what it looks like from the summit.

Help your clients see the unique potential of their financial lives with clarity, precision and transparency.

Our industry-defining perspective features client values, goals and intergenerational dynamics. We don't impose. We don't steamroll the subtleties of advice in favor of unyielding workflows or zero-customization models.

Today, our technology is recognized as one of the industry's best, most client-friendly platforms that exists.

YOUR ADVICE IS THE GUIDE

Put values at the center of your screen

Accent the intricacies.

Celebrate the details of your advice. We believe technology should conform to the curves and corners of your practice, not restrict it.

Designed for connection.

Client values and goals are the foundation on which our platform is built, making memorable client communication the norm, not the exception.

Engage with industry-first visuals.

Your advice is everything but generic. Let your guidance shine with eye-catching illustrations and powerful presentations.

Pave over your point solutions.

Realign your systems, unifying and simplifying your technology into one delightful experience.

RARE PERSPECTIVES
BRING RARE OPPORTUNITIES

Set your advice apart.

Technology built from your client's point of view is all-too-infrequent in the wealth management industry. But that differentiation is exactly what sets advisors using Summit apart from the rest of the industry.

By starting from a different perspective, we're unlocking new opportunities for client engagement, innovative guidance and summit-level service.



TECHNOLOGY THAT CAN'T BE TOPPED

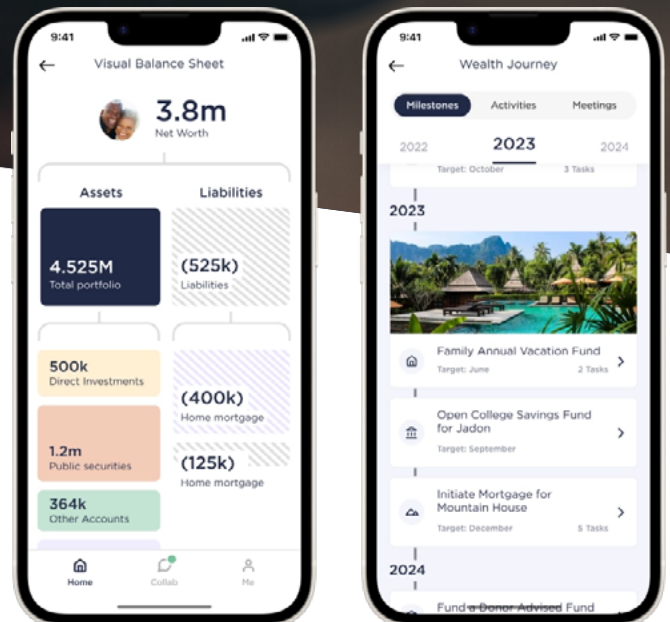
Software that adapts to you.

Advisor software doesn't need to be restrictive, prescriptive or vapid. We believe a simple, elegant platform that puts your clients' values at the center of the screen is what allows advisors to immediately connect with their clients and begin working together, from the moment they meet.

BUILD A BOLD BUSINESS

What your firm needs

Gain insights with impeccable advisor-client alignment. Deploy a flexible platform that empowers Advisors and prompts genuine connection, with technology that exceeds expectations.



Why Summit?



Co-create a comprehensive financial future



Unlock your practice's potential



Celebrate client values and true connection



Book a Meeting

About Us

We've spent years working in—and building tools—to advance the industry. We start each day by collaborating with our clients, tapping into future-oriented inspiration and rolling up our sleeves to complete our newest projects.

We believe innovation, communication and simple, elegant solutions should be at the center of every workflow, so advisors can stand at the top of their technology.

Visit our [website](#) or email us at abundance@summitwealth.io

**We're a team of
technologists and
design thinkers,
planners and
problem solvers—
just like you.**

OUR OFFICES

San Francisco, CA

Jacksonville, FL

Contact us:
abundance@summitwealth.io



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