



ABOUT PITON WEALTH

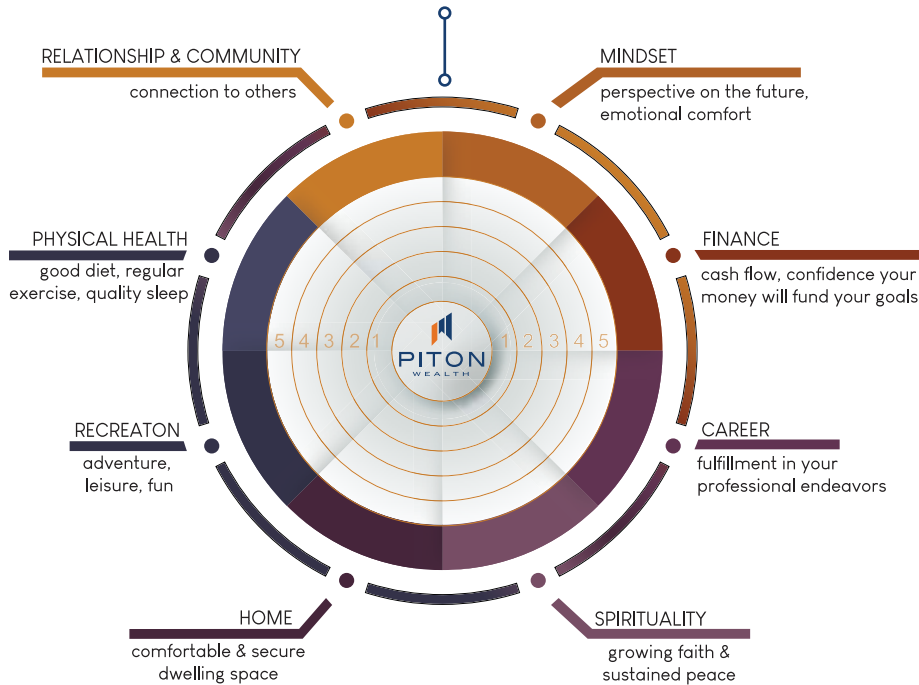
Offices in Kennewick, WA and Kalispell, MT

Founded in 2002, became an independent financial planning practice in 2018

Experienced with serving clients all around the country

Voted Gold Best Financial Planner in 2023 Tri-Cities Best Magazine

PITON WHEEL OF WELLNESS



www.pitonwealth.com

this guide online at pitonwealth.com/mediaguide



MEDIA GUIDE

Financial Planning for Comprehensive Wellness

REACH OUT FOR THE EXPERTISE OF PROFESSIONALS ABOUT:



Financial planning for comprehensive wellness

Strategic charitable giving

Estate planning

Retirement planning

The growing profession of financial advising

PITON'S WEALTH ADVISORS



Michelle is a CERTIFIED FINANCIAL PLANNER™ professional, chartered financial consultant, chartered life underwriter, retirement income certified professional, and accredited estate planner.

Ask Michelle about any of the above as well as:

- Estate planning & charitable giving
- Financial planning for scientists & engineers
- Excelling as a female executive

michelle.clary@pitonwealth.com

MICHELLE A. CLARY,
CFP®, CLU®, ChFC®, RICP®,
AEP®, Founder/CEO



Aaron is a CERTIFIED FINANCIAL PLANNER™ professional.

Ask Aaron as a planning professional as well as:

- Financial planning for those recently divorced or widowed
- Assisting federal employees

aaron.ells@pitonwealth.com

AARON ELLS, CFP®



Nick is a CERTIFIED FINANCIAL PLANNER™ professional.

Ask Nick as a planning professional as well as:

- Investment strategy
- Financial planning for scientists & engineers

nick.mercer@pitonwealth.com

NICK MERCER, CFP®



Kaitilin is a Chartered Retirement Planning Counselor.

Ask Kaitilin as a professional financial planner as well as:

- Financial planning for entrepreneurs
- Focus on client education

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KAITILIN NEWMAN, CRPC®