



ABOUT PITON WEALTH

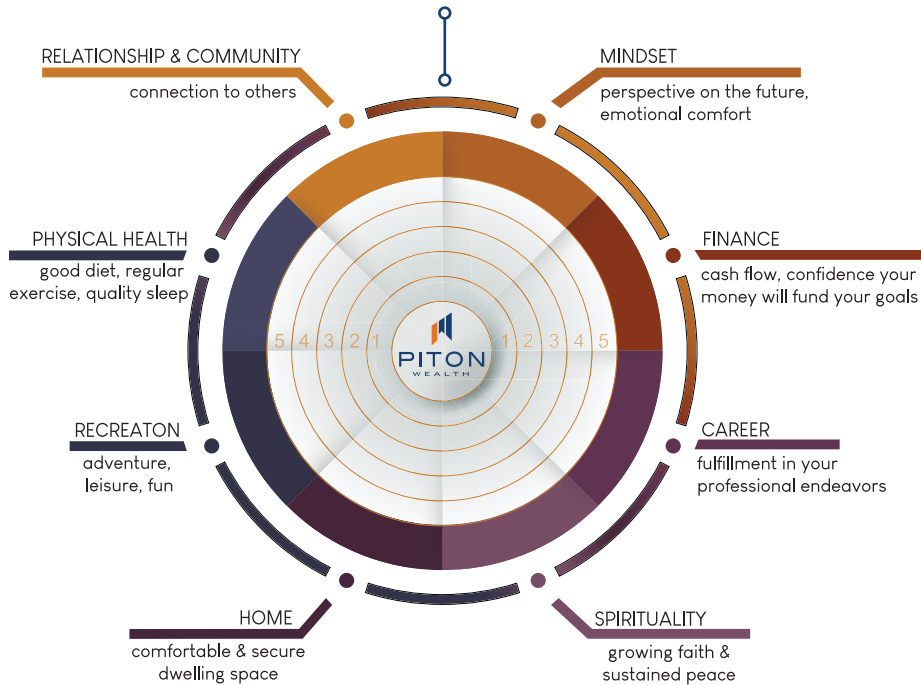
Offices in Kennewick, WA and Kalispell, MT

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](http://www.pitonwealth.com)

this guide online at [pitonwealth.com/mediaguide](http://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 A. CLARY,**  
CFP®, CLU®, ChFC®, RICP®,  
AEP®, Founder/CEO

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
- Financial planning for entrepreneurs
- Excelling as a female executive

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**AARON ELLS,**  
CFP®, CDFA®

Aaron is a PROFESSIONAL, AND CERTIFIED DIVORCE FINANCIAL ANALYST.

Ask Aaron as a planning professional as well as:

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

[aaron.ells@pitonwealth.com](mailto:aaron.ells@pitonwealth.com)



**NICK MERCER,** CFP®

Nick is a CERTIFIED FINANCIAL PLANNER™ professional.

Ask Nick as a planning professional as well as:

- Investment strategy
- Financial planning for scientists & engineers

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## Begin your journey today.

Getting started is simple. We give you a planning engagement to sign, a checklist of documents to gather, and an appointment to drop off your documents—virtually or in person. Then you're ready to begin our four-step planning process, The Navigated Journey™, and start making progress toward your goals.