

THE TEN MOST  
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# Wealth Managers

OF THE  
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THE COMPANIES  
SELECTED EXCEED  
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Exceptional Client  
References

10+ Years Experience

No Lawsuits or  
Grievances

Signed Fiduciary Oath

Advanced  
Certifications Held

Comprehensive Range  
of Wealth Management  
and Financial Planning  
Services Offered

## Financial Strategies Institute

6955 Union Park Center, Suite 250  
Salt Lake City, UT 84047  
801-316-4100 || [www.fsiplanners.com](http://www.fsiplanners.com)  
*FSI focuses on investment education, tax-efficiency and specific investment strategies, and is a leading provider of wealth and financial services in Utah and the Rocky Mountain area.*

## Integrity Financial Solutions

Wheat Ridge, CO 80033  
303-462-2001  
[www.ifsweb.com](http://www.ifsweb.com) || [imoneycoach.com](http://imoneycoach.com)  
*A fee-based registered investment advisor, Integrity Financial Solutions coaches its clients to develop and master financial skills and habits.*

## Sharkey, Howes and Javer

720 South Colorado Boulevard  
Suite 600 South Tower  
Denver, CO 80246  
303-639-5100 || [www.shwj.com](http://www.shwj.com)  
*This firm's team approach provides the expertise necessary to handle complex issues and inspire confidence. Their client-centered relationships go well beyond managing money.*

## ABG Consultants, LC

A DIVISION OF ALLIANCE BENEFIT GROUP

3200 South 700 East  
Salt Lake City, UT 84106  
801-486-5069 || [www.consultabg.com](http://www.consultabg.com)  
*With over 27 years experience, ABG Consultants is the wealth, retirement, growth and preservation expert. ABG excels in personalized investment advice and custom corporate retirement plans across the U.S.*

[www.themostdependable.com](http://www.themostdependable.com)

*TheMostDependable.com is a service of Goldline Research. Goldline Research uses a rigorous proprietary research process to evaluate tens of thousands of service providers each year in numerous industries. We have verified the criteria above for each of the companies represented. The companies listed above are listed in no particular order, and we make no specific comparisons between the companies listed above and any unlisted companies. Goldline Research is not affiliated with Forbes® magazine.*

## Stack Financial Management

2472 Birch Glen, Suite A  
Whitefish, MT 59937  
800-790-5001 || [www.investech.com/sfm.cfm](http://www.investech.com/sfm.cfm)  
*With a national reputation for its "safety-first" investment strategy, SFM services individual clients, corporations, trusts, and retirement plans throughout the United States.*

## The Wealth Conservancy, Inc.

1525 Spruce Street, Suite 300  
Boulder, CO 80302  
888-440-1919 || [thewealthconservancy.com](http://thewealthconservancy.com)  
*Offering TIES® (The Inheritance Empowerment System), which, nationally, enables inheritors to thrive in spite of their wealth.*

## Cornerstone Financial Advisors

1858 East First Street  
Idaho Falls, ID 83401  
208-529-6643  
[www.cornerstonefinancialadvisors.net](http://www.cornerstonefinancialadvisors.net)  
*Cornerstone Financial Advisors is a leading provider of wealth management services to individuals and retirees throughout Idaho and the Rocky Mountains.*

## Peak Capital Investment Services, LLC

640 Plaza Drive, Suite 120  
Highlands Ranch, CO 80129  
303-972-7786 || [www.peakcapital.com](http://www.peakcapital.com)  
*Peak Capital Investment Services provides comprehensive financial services to high net worth investors and companies—solid advice from an experienced team making the right moves with clients' retirement assets.*

## Davidson Investment Advisors

8 Third Street North  
Great Falls, MT 59401  
406-727-6111  
[www.davidsoninvestmentadvisors.com](http://www.davidsoninvestmentadvisors.com)  
*Davidson Investment Advisors provides professional money management to individual investors, corporations, foundations and trusts. They offer multiple investment styles to help clients meet their objectives.*

## Pinnacor Financial Group, Inc.

4101 East Wesley Avenue, Suite 1  
Denver, CO 80222  
303-758-2002 || [www.pinnacorfinancial.com](http://www.pinnacorfinancial.com)  
*Pinnacor Financial Group offers personalized comprehensive wealth management services to successful individuals, families, business owners and executives.*

**415-892-9400**