TRUSTED PROFESSIONAL SERVICE PROVIDERS

A Trusted Professional Referral Service for Clients, Customers & Consumers

Trusted Provider of: FINANCIAL SERVICES

Peak Level Advisors
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Profile of Services

- I provide clients with professional financial planning to identify the obstacles to achieving their financial goals and with solutions to help them overcome those obstacles, taking a comprehensive approach to evaluating client needs. We then address those needs by developing and implementing a program that is customized for each client's situation.
- I help people implement financial strategies to accomplish their goals and specialize in working with people in or approaching retirement, using our ***COMPASS*** Portfolio Management System and our ***GUIDE*** Retirement Income Distribution System, to manage their assets and provide income throughout their retirement years. In addition I offer a variety of value added services to help clients of all types better manage cash flow and stay financially organized.
- As an independent financial advisor I approach each client as an individual and can customize solutions to meet the client's specific needs, selecting from a wide variety of financial products and services. I use established processes to ensure that the focus is on helping the client accomplish their dreams and goals in a way that is consistent with their principles and their comfort level.

Market Profile

- I am located in Northern Metro Atlanta and serve that community, but I serve clients throughout Metro Atlanta as well as in other states where I am licensed, including Missouri, Illinois, and California.
- My ideal clients are mature professional women, both employed and business owners, who are in retirement or approaching retirement within 5-10 years and are looking for financial planning to help them maximize the assets they have accumulated over their working years.
- The value I provide to clients is in my commitment to offer a highly interactive approach that keeps the client informed and involved in the process. I believe the client should understand what strategies we are implementing and why so that we build a long-term relationship aimed at meeting mutual goals.

For Trusted Professional Service Contact:

Kevin Turner, President
"Your Personal Wealth Navigator"
Financial Advisor, CFS
Office Hours: 9:00 am - 6:00 pm
Meetings by Appointment Only

TRUSTED PROFESSIONAL SERVICE PROVIDER
Endorsed by the North Atlanta Regional TiPS Chapter

Integrity Commitment Fairness Credibility Opportunity