

2009 LEADING PROVIDERS

Wealth Managers

OF THE NORTHWEST
UNITED STATES
& HAWAII

**THE PROVIDERS
SELECTED EXCEED
THE CRITERIA BELOW**

Fee-Only, Fee-Based
or RIA

No Unresolved Lawsuits
or Grievances

Advanced
Certifications Held

Comprehensive Range
of Wealth Management
& Financial Planning
Services Offered

20+ Years of Industry
Experience

Multop Financial ❁

333 Calluna Court, Suite 205
Bellingham, WA 98226
877-671-7890 || www.multop.com

Multop Financial provides impressive customer service blended with skilled income tax planning and portfolio management for high-level financial strategies.

SECURITIES OFFERED THROUGH PACIFIC WEST SECURITIES, INC. MEMBER FINRA/SIPC. FINANCIAL ADVISORY SERVICES THROUGH PACIFIC WEST FINANCIAL CONSULTANTS, INC., A REGISTERED INVESTMENT ADVISOR.

Lee Financial Group

2756 Woodlawn Drive, Suite 6-201
Honolulu, HI 96822
808-988-8088 || www.leehawaii.com

Lee Financial Group provides a high level of old-fashioned aloha spirit combined with professionalism and a veteran staff with the expertise to answer tough questions.

Sweetwater Investments, Inc.

16398 NE 85th Street, Suite 201
Redmond, WA 98052
877-861-0112 || www.sweetwaterinv.com

Sweetwater is a fee only RIA providing true fiduciary services in all aspects of financial advice. Sweetwater's advice targets optimal solutions for client's real emotional and financial concerns.

Summit Asset Strategies, LLC

10655 NE 4th Street, Suite 500
Bellevue, WA 98004
425-646-7101

www.summitassetstrategies.com

Summit Asset Strategies, a premier independent wealth advisory firm in Bellevue, Washington, was founded on the philosophy of offering sophisticated investors an integrated wealth planning experience.

Investor Resources, Inc. ❁

Bellevue, WA
Port Orchard, WA
800-317-9119

www.InvestorResourcesInc.com

IRI creates a financial Global Demographic Strategy enabling clients to successfully navigate the global economic tsunami.

Comprehensive Wealth Management ❁

4100 194th Street SW, Suite 205
Lynnwood, WA 98036
425-778-6160

www.ComprehensiveWealth.com

Comprehensive Wealth Management (CWM) is a financial planning and investment management firm that specializes in leveraging and increasing assets for executives, professionals and small business owners.

Bellevue Financial

10811 Main Street
Bellevue, WA 98004
800-401-4534 || www.bellevuefinancial.com

Bellevue Financial's goal—helping you reach yours. Their applied expertise in planning and investment management thoughtfully guides clients on their financial and individual journeys.

❁ Third Year Selected

❁ Second Year Selected

www.goldlinersearch.com

415-892-9400

Goldline Research strives to provide objective research on professional services companies. Although Goldline Research confirms that at the time of initial publication of this list each company meets the general criteria above, no promise is made that they will continue to do so, or that a particular service provider is appropriate for the reader's individual circumstance. Only you can determine this after your own independent inquiries. Any use of the information provided herein is your own risk. Goldline Research disclaims all liability or responsibility for injury arising from your utilization of the information contained herein. Companies are listed in no particular order and no comparisons are made between the listed companies and any unlisted companies. Goldline Research is not affiliated with Forbes® magazine.