



PETERSEN HASTINGS
WEALTH ADVISORS

INDIVIDUALS &
FAMILIES



You're more than a number.

Finding the right financial advisor can be a challenge. Many advisors focus only on the numbers without truly understanding your unique dreams, motivations, and potential.

That's where we come in.



Discovering where you're most invested in life.

Building you the financial freedom to live it.

Petersen Hastings Wealth Advisors provides financially established individuals with clear and personalized visions of their unique financial futures.

The result is a more meaningful wealth management experience because of the connections between the firm, advisor, and client.

Fiduciary | Independent | Fee-Only

Life isn't linear.

Your plan shouldn't be either.

What you probably think about...



Life is unpredictable.

You need a dependable strategy for when life's challenging moments arrive.

What might actually happen...



EXPLORE

An advisor who truly gets you.

Our client discovery process digs deeper to establish an understanding and meaningful connection between you and your advisor.

Not one just about numbers and charts, but about your life, your dreams, and your goals.



Your strategy begins with you.

What do you really want? To support your favorite causes? To send your children or grandchildren to college? To feel confident you have enough?

Our evidence-driven, deep planning approach is centered around your life: your goals, your dreams and the impact you want to make on this world.



We get you, to get you there.

A plan that's right, and right for you.

**Investing with our heads for your heart.
Based on academic research and data,
rather than emotions and with your
best interests in mind.**

Because investing with the right
intentions is only truly successful
when partnered with the correct
approach.



Your goals matter.

Fill it with less guesswork and more science with evidence-based investing.

There are many ways and products to invest your money – evidence suggests that some methods are better than others.

1. Research



Historical wisdom was based on extensive research of individual companies to identify the best companies to invest in. This information was passed from the analyst to the broker who purchased and sold stocks and bonds to their customers.

2. Evidence



Much like the medical field, investment strategy has changed as the evidence of performance has been observed. The evidence suggests that selecting a broad array of stocks and bonds designed to achieve specific client goals is more important than the research of single companies.

3. Design



Following the evidence continues with designing a broadly diversified portfolio that is tax efficient, cost effective, and goal oriented.

4. Monitor



The portfolio is rebalanced and optimized over time as global economies, taxation, and investment goals change.

ACTIVATE

A team to build your dream.

Our team culture helps shape your financial future.

When you work with us, you're getting more than an advisor; you're getting our entire team. Giving you access to the best possible advice and solutions, as we work towards the same goal: *your success.*

Who's on your team?





YOUR INVESTED JOURNEY

TAKE CONTROL OF YOUR FINANCIAL FUTURE



1. EXPLORE

Design the future you desire by taking a deep dive into your unique life.



2. FOCUS

Clear the noise and focus on factors that actually matter.



3. ACTIVATE

Truly begin your journey by investing where it really counts, in all aspects, with a team that knows the full you.

Start investing in yourself, because we're ready to invest in you.



Book Your Exploration Session Today



PETERSEN HASTINGS

WHERE YOU'RE INVESTED



petersenhastings.com

