

Serve your clients

FiNet supports Financial Advisors who serve their clients and their communities



*Brandon Blair, Senior Financial Advisor, Managing Partner,
Amber Columbus, Administrative Manager,
Richard Lee, Senior Financial Advisor,
Barb Hacke-Resch, Senior Financial Advisor,
Mike Costa, CFP®, Senior Financial Advisor
– Summit Wealth Management, LLC – Salem, OR*

Since day one of their careers in the financial services industry, Mike Costa, Richard Lee, Brandon Blair, and Barbara Hacke-Resch, owners of Summit Wealth Management, have had three goals: to better themselves, to better their clients, and to better their community. Ultimately it was the need to serve their community that led them to independence. “We’ve had these goals since the day we started, but a wirehouse culture didn’t foster that kind of charitable philosophy,” says Barbara. “The structure of Wells Fargo Advisors Financial Network (FiNet) really allows us the independence and flexibility to give back our time and our resources.”

Summit’s Financial Advisors use the flexibility they’ve found with an independent practice to allow their staff to serve not only their clients, but also their community by contributing their resources to a variety of local charities. The firm’s four Financial Advisors allocate personal funds into their charity, Summit Cares, and each month the Summit team decides together where to donate the funds.

“We have more control over our business, and we use that to create opportunities for our Financial Advisors to serve the community in ways that reflect their unique interests and passions,” says Mike. “We now have the ability to allow Amber Columbus, our Administrative Manager, to spend a few hours per week volunteering at a local school. Our Financial Advisors also have the ability to donate resources to charities that affect them personally.”

It’s a unique opportunity to be able to volunteer time to local organizations during work hours. However as part of an independent practice, Financial Advisors can be more flexible in the ways they contribute to organizations. The Summit team’s office frequently hosts fundraisers and invites clients and community members to participate in supporting organizations funded by Summit Cares.

“Being a business owner makes us feel more connected to our neighbors and our clients,” says Mike. “Every day we walk into our office and feel like we are a part of our local community. We are happy to give back.”

With the guidance of FiNet, the Financial Advisors at Summit Wealth Management are able to spend more time developing the aspects of their business that are most important to them. FiNet makes the nerve-wracking experience of opening a new business smooth and gave the Summit team confidence in their decision with ongoing guidance and support. In doing so, FiNet’s unique structure allows the business and its Financial Advisors to spend time and resources developing Summit Cares and the charitable aspect of their business.

“The best thing about being independent with FiNet is the flexibility to make the decision to donate our time and resources in order to give back to our clients, our community, and our practice,” says Barb. “It enforces every day why we made the change.”

Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC (WFAFN). Summit Wealth Management, LLC is a separate entity from WFAFN.