Peak Financial Management

Peak Financial Management, Inc. based in Waltham, Massachusetts, is a fee-only investment advisor registered with the Securities and Exchange Commission. Peak Financial Management provides professional and experienced investment management and planning services to high net worth clients.

Peak Financial Management revolves around adding the most value to clients. In order to do this, Peak Financial has adopted principles that align the firm's goals with that of the clients. Peak Financial devotes little resources to marketing itself . The focus is financial planning process and ensuring sound execution of the clients' financial plans. Constant monitoring of portfolios and management of the clients' financial situations frees clients of a heavy, important burden that no individual or family should face alone.

Peak Financial Objectives

- Maintain close client relationsips
- Ensure complete transparency
- Remain independent of any conflict of interest
- Build honest, accurate, comprehensive financial lans
- Build portfolios based on our clients goals and objectives
- Strive to limit clients' exposure to risk
- Provide clients' with value-added advising services and a piece of mind
- Strictly follow Peak's Code of Ethics