Twin Peaks Wealth Management serves families and individuals, including professionals and owners of closely held businesses, with a focus on personal attention. Our expertise allows our clients to meet a wide range of goals.

What They Value

Our clients value an advisory relationship that is:

- Based on their overall needs, and not revolving around financial products
- Rooted in a higher-touch, less-corporate approach
- Grounded in a conflict-free and transparent business model

Successful and Diverse

Twin Peaks understands there is meaningful work to be done advising a broad range of successful clients. Financial planning services are offered to all, regardless of income or investible assets. Investment advisory relationships are offered to clients with at least $250,000 to put to work.

For clients receiving financial planning services who have less than $250,000 of investible assets, Twin Peaks may offer to open client-directed brokerage accounts at TD Ameritrade Institutional. This enables Twin Peaks to assist clients implement investment recommendations, offer access to a large universe of institutional-quality investments with lower fees, and offer optional performance reporting services.

A Mutual Respect

Twin Peaks clients are often vibrant contributors in fields such as education, law, and medicine. Many are entrepreneurs. We value the opportunity to get to know our clients and to help ensure their financial success.