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Pat's clients value his ability to help them envision a greater financial future, and guide them, step by step, to build towards that future. He starts by showing them a clear picture of where they are today, and listens to their concerns for their "tomorrow". By recognizing their desires and discovering how to achieve them, he can help his clients develop financial wealth as they create richer lives for themselves and their families.

Pat and his specialized financial team are dedicated to working with business owners, professionals and families to achieve their goals of accumulation, distribution, and conservation of wealth throughout their lifetimes. A priority is to provide clients with greater protection, flexibility, and control over their assets. His practice develops comprehensive financial strategies that encompass wealth accumulation, retirement planning, tax efficient asset management, business planning, wealth distribution and estate planning with a strong emphasis on protection from risk and keeping his clients' family and business legacies intact. Pat and his elite team utilize the most sophisticated tools and strategies available, while ensuring clients can understand and are comfortable.

Born into a legacy of his own, Pat is a third generation financial advisor who was born and raised in beautiful Missoula, Montana. After graduating from high school as a 4-time All-State Wrestler, he earned a degree in International Studies at the University of Washington. Aspiring to live overseas, Pat next moved to Nagasaki, Japan where he spent 3 years working as an English Teacher under the Japanese Ministry of Education, as well as acting as a Cultural Ambassador in his community.

After returning to the US from Japan, Pat followed in his father's footsteps to pursue a career in financial planning, and now has an expanding multi-state practice based in Phoenix, Arizona working with clients in over 40 states nationwide. His process allows clients to engineer their estates and businesses to fuel their ambitions for building a legacy, while still getting full use and enjoyment of their assets.

Pat and his wife, daughter and 2 dogs live in Phoenix where they enjoy outdoor sports and world travel.

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