Our Client Service Commitment

Communication: Four ways to stay connected with us anytime

1. Phone UT 801-513-2545 TX 281-990-8228
2. Text 385-503-8625
3. Email info@promontoryfp.com
4. Schedule a meeting on website www.promontoryfp.com

Responsiveness: Goal within 1 business day we will get back to you

We provide timely, clear, and proactive communication. Clients are kept informed during all periods of market movements and significant economic events, with explanations delivered in straightforward, understandable language. Please read our monthly email newsletter to stay informed.

Proactive: Goal-Based Planning

We regularly review financial goals, assumptions, and strategies to ensure alignment with life changes, market conditions, and evolving priorities. Planning decisions are made with a long-term perspective.

Personalized Advice

Advice is tailored to each client's unique objectives, values, and circumstances. We take the time to understand what matters most and adjust recommendations accordingly.

Education & Transparency

We explain recommendations, risks, and trade-offs clearly and openly. Fees, costs and risks are transparent and discussed openly.

Fiduciary Commitment

As a fiduciary, we act in our clients' best interests at all times. Recommendations are based solely on what we believe is appropriate for the client's goals and risk tolerance.

Investment Stewardship

We follow a disciplined investment process focused on diversification, risk management, and long-term objectives.

Tax & Professional Coordination

We consider tax implications as part of the planning process and coordinate with clients' tax and legal professionals.

Operational Excellence

We strive for accuracy, efficiency, and follow-through in all administrative matters, aiming to make the client experience as smooth and efficient as possible.

Long-Term Partnership

Our focus is on building lasting relationships and measuring success by progress toward client retirement goals.