



SUMMIT
FINANCIAL GROUP, LLC

SUMMIT FINANCIAL GROUP IS A COMPREHENSIVE PLANNING AND WEALTH MANAGEMENT FIRM PROVIDING INSIGHT AND SOLUTIONS THAT ASSIST CLIENTS WITH THEIR FINANCIAL DREAMS.

BRAND ANALYSIS - LOGO REDESIGN -
WEBSITE REDESIGN - RESPONSIVE -
CMS DEVELOPMENT - WORDPRESS -
HOSTING / MAINTENANCE

About Summit

Summit places clients at the forefront of their efforts, provide unparalleled support for our people, and make an impact in our community. They are stewards along life's financial journey, nurturing and guarding the wealth their clients have spent a lifetime creating. They needed a website to better communicate how Summit helps clients chart their course for their financial future.

Business Objectives

- Update brand positioning & design
- Enhance online image
- Increase website usage
- Increase newsletter registration

Services Provided

- Brand analysis & definition
- Logo redesign
- Website redesign
- Responsive development
- Website development on WordPress
- Hosting / Maintenance

Exit Planning Six Steps

The Business Team | **Exit Planning Six Steps** | What Kind of Owner Are You?



Whether you plan to sell your company outright, transfer to management, or pass to children, you need a roadmap to help you get there. While Exit Planning can feel overwhelming, our 6 Step Process is valuable in formulating a game plan and making progress towards your goals.

THE 6 STEP EXIT PLANNING PROCESS:

Step One – Establishing Owner Objectives

What would you like to achieve with your exit? When? For many owners, it isn't simply one thing. Often, it is financial security or diversification. It could be a desire to involve children or to reward key employees. Perhaps it's to achieve the freedom to enter the next chapter of life. Whatever it is for you, it's important that you spell out your goals.

Step Two – Financial and Mental Readiness

Do you know what it would take to be financially independent outside of your company? A thorough analysis will determine the financial resources you'll need to fund your exit. The results define the Value Gap between your projected exit value and the resources you have available. Additionally, you must assess your mental readiness for exit. What will you do after exit? How do you feel about being identified as someone other than the owner of your firm? The mental game is often more challenging than owners think.

Step Three

Business owners typically fall into four categories based on their financial/mental readiness. Your exit options become more defined as you understand your own exit strategy. Who do you resemble?

- Rich and Ready To Go – Financially ready to start life's next chapter.
- Wealthy But Enjoy Work – You are financially set, but you like working and don't want to retire.
- Stay and Grow – You're not financially ready, and are happy to work to build net

Our Mission

Analyze and redefine the Summit brand, create a new logo and design a new website that depicts the brand essence. Develop the site on a CMS system that is easily maintained by Summit.

LOGO REDESIGN

Moonstone designed a new modern logo that emphasizes the Summit brand essence. The mountains not only fit the name Summit but represent the financial “journey” with each client. The mountains are strong and sharp showing their strength and the fonts are softer to show their compassion.



Original Logo

ReDesigned Logo

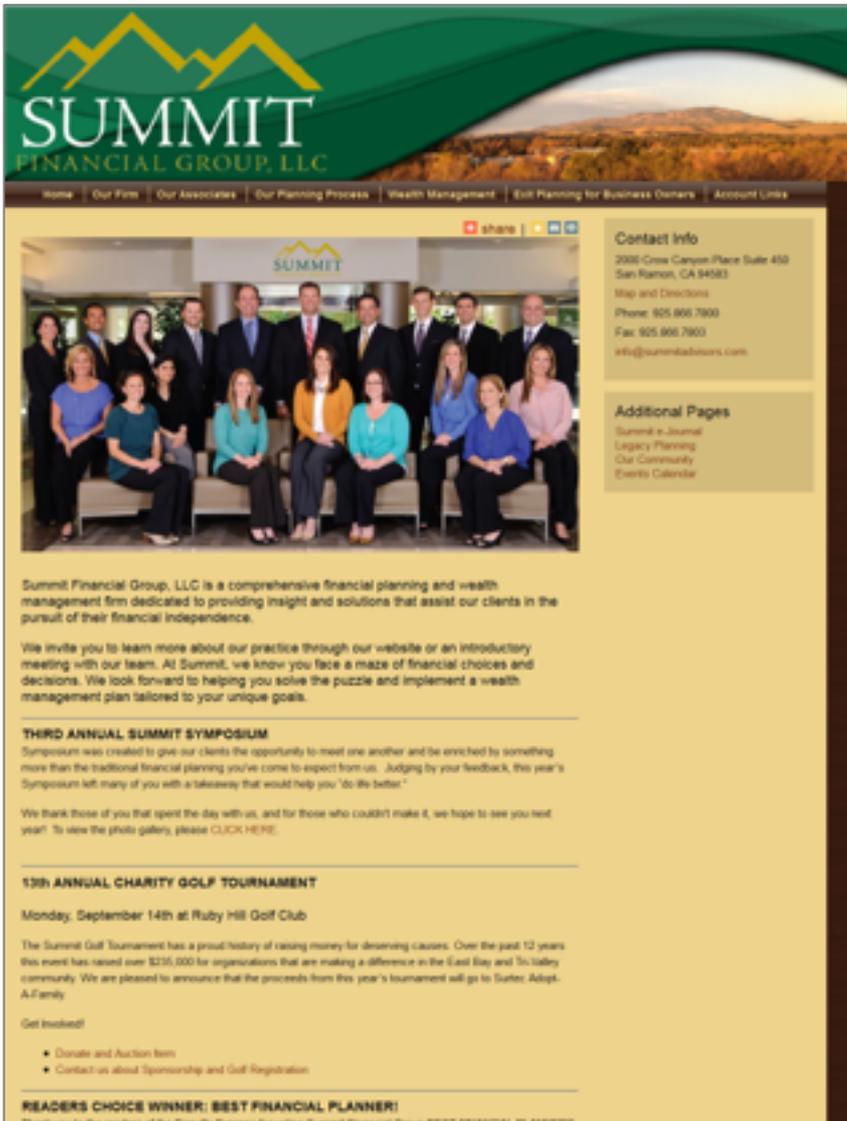




Branding Analysis

To better communicate to potential clients why Summit is the right choice for financial planning and wealth management, Moonstone defined brand positioning and messaging for Summit's unique approach and client benefits. We did a very extensive analysis that involved discussions with the Founders and Advisors, interviews with multiple employees and of course clients, and analyzing competitors. This extensive information provided to the foundation for defining the Summit Brand.

This is just one tool used in the analysis process. During the discussions and interviews we asked each person how they would describe Summit. After compiling all the data, you can see in the chart the words that were used. The larger the words the more often they were mentioned.



Before

Summit's site design was very much out of date with a dark unappealing color scheme using a common template. The site did not display well on different devices. That website did not depict the skills, personal service, nor differentiation of the Summit brand.

Also, Summit had to go through a third party vendor in order to get any information updated on their site, which was not cost effective or efficient. Information updates took weeks.



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“We came to Moonstone in need of a rebranding overhaul – new website, new logo, and increasing website usage and visibility. Our expectations were definitely exceeded. Our clients continue to comment on our beautiful new logo and clean website. Mary and the team at Moonstone are also responsive and easy to work with, right down to the support and training for site upkeep. We’re very happy with our new image!”

Nathan Bennett

Financial Advisor,
Partner at Summit Financial Group, LLC.

Moonstone designed a professional, compelling, and eye catching website with a new modern look and feel that emphasizes the Summit Financial’s caring and compassionate brand.

Our Re-Design

Wordpress CMS

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SUMMIT PERSPECTIVES
STAY INFORMED



Summer Q3 Newsletter Now Available

[Read More >](#)

 **14th ANNUAL CHARITY GOLF TOURNAMENT** 

September 19th Ruby Hill Golf Club

Benefiting Canine Companions for Independence!

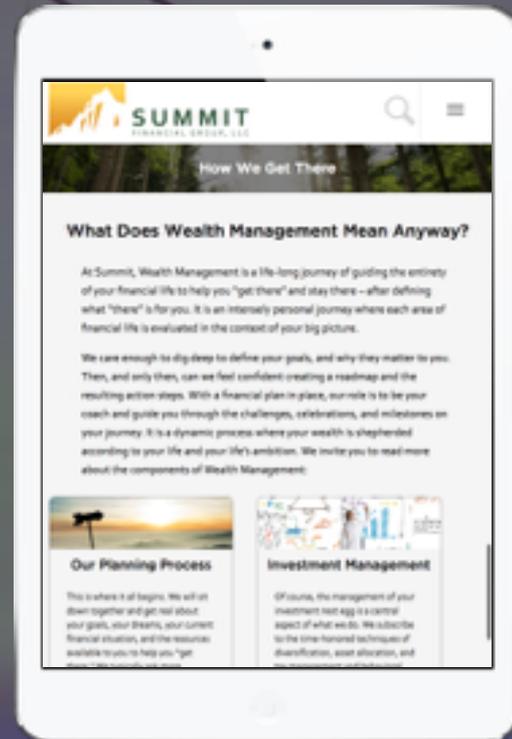
[Read More >](#)

Wordpress CMS

Moonstone recommended WordPress as a good fit for the size of website and functionality Summit needed. WordPress is an open source CMS. It has a very user friendly interface making it easy for Summit to make updates to their site.

Responsive

Responsive web design is not only about adjustable screens and automatically resizable images, but rather about a whole new approach to web design. The adaptable page view improves usability and readability on smaller devices





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The Why



Wealth Management



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Guiding Business Owners



Investments



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Our Project Goals & Accomplishments

Moonstone provided a powerful logo and beautiful website that conveys who Summit Advisors really is. Now when you come to the site you can feel the warmth and caring personalities of the staff with casual images and fun facts in their bios. Summit has received numerous compliments from both clients and industry peers.

The site is now on WordPress CMS (with responsive bootstrap CSS) and it is easy for Summit to update and maintain. What used to take weeks to months to get posted out to web, now only takes minutes to days.

Also, the new website has become a vital marketing tool for their sales team.

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Check the background of this firm on FINRA
BrokerCheck

RECENT NEWS

Summit Places 4th at Junior Achievement's Social Innovation Camp!
July 26, 2015

2015 Year End Tax Planning
October 7, 2015

The Long-Term Care Conundrum
October 7, 2015

EVENTS

Virtual Town Hall on Current Market Volatility - 8/24
Summit Financial Group Partner, Nathan Bennett held a Virtual Town Hall Meeting on current market ...

Monday, September 14th - Charity Golf Tournament
Summit Financial Group, Annual Charity Golf Tournament Monday, September 14th Ruby Hill Golf Club ...

A Successful Blood Drive at Summit
A tremendous THANK YOU to all who participated in today's blood drive. According to the Red ...