

THE JUMET WAY



PUTTING CLIENTS FIRST, ALWAYS

At Jumet Financial, our mission is simple: your success is our success. We are more than financial advisors — we are partners in your financial journey. As fiduciaries, we are committed to putting your best interests first in every recommendation and every decision we make. The Jumet Way reflects our promise to deliver personalized, transparent, and holistic financial planning tailored to your goals.

WHAT SETS US APART?

Fiduciary, Client-First Philosophy – We act as fiduciaries for our clients, meaning your financial wellbeing always comes before anything else. We take the time to understand your full financial picture and build strategies that fit your life — not a one-size-fits-all approach.

A to Z Financial Planning – From your first investment to retirement, and everything in between we guide you through every stage of your financial life. We provide advice on a comprehensive suite of investment strategies tailored to address your individual goals.

Holistic Financial Approach – Wealth management is more than just investing. We take the time to understand your life goals, milestones, and concerns while building strategies that align with your future.

Accessibility – There are no minimums to work with us. Whether you are just starting out or well into retirement planning, we believe everyone deserves quality financial guidance.

Proactive & Personalized Communication – We stay in touch because we care. From celebrating life events to adjusting strategies as your needs change, you will never feel like just another account. We seek to have you feel confident in your financial strategy and comfortable every step of the way, knowing you can value the advice we provide.

Rooted in Community – With offices in Pennsylvania, Ohio, Arizona, and Massachusetts, and our headquarters in Beaver Falls, PA, we are deeply committed to the communities we serve. Giving back is a part of who we are.

At Jumet Financial, we aren't just managing wealth — as fiduciaries, we are helping you build the life you envision while always putting your best interests at the forefront.

That's the Jumet Way.

www.jumetfinancial.com

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