



Blue Summit Financial Group, Inc.
Investing for a Better Tomorrow



Aligning Personal Values with Sustainable Financial Planning Solutions

www.bluesummitinvest.com

Sustainable Investing

Sustainable Investing, also called Socially Responsible Investing (SRI), incorporates the fact that there are two impacts to your investments. Your investments are working for you financially as well as helping support the companies you invest in. Through managing SRI portfolios, engaging in shareholder activism, and promoting community investing we are committed to assisting investors in promoting sustainable business practices while earning competitive returns.

Our Services

"The biggest step in any journey is always the first step."

At **Blue Summit Financial Group**, we believe that success is a journey, not a destination. You know from the very start that our entire staff truly cares about helping you achieve your financial dreams.

Whether it is dealing with an inheritance, managing a foundation, starting a company retirement plan, sorting out a life transition, or handling the sale of your business, we take the time to get to know your needs and goals, establish a plan of action, and ensure that you keep on track.

At **Blue Summit Financial Group**, our specialty is making sure that you meet your financial goals and stay in line with your values. Today more than ever, environmentally and socially responsible portfolios are offering investors competitive returns.

Our process utilizes a holistic, big-picture approach, providing the highest level of service along your path to financial peace of mind.

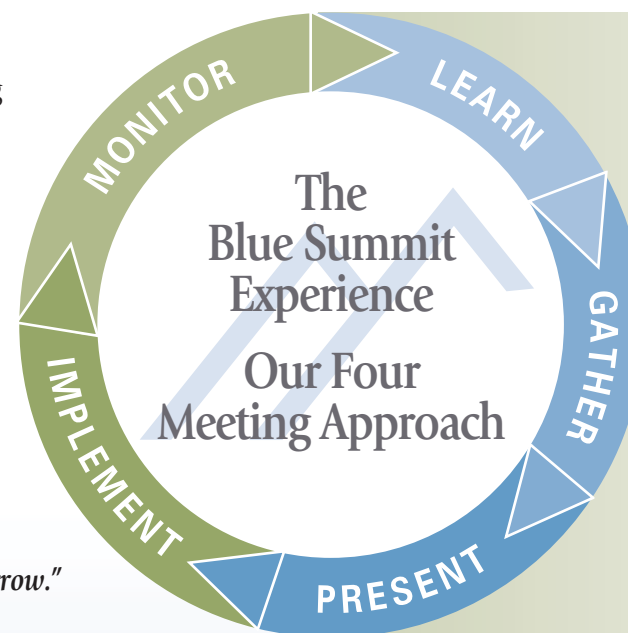
At Blue Summit Financial Group we help you *"Invest for a Better Tomorrow."*

About Us

Established in 1994 and headquartered in San Diego, **Blue Summit Financial Group** is one of the nation's most trusted financial services firms specializing in sustainable and socially responsible investing.

At **Blue Summit Financial Group** our goal is to give you financial peace of mind. You will find that our advisors work to combine your personal values and goals into a comprehensive financial plan of action, implementation, and ongoing review. **Blue Summit** is your choice for developing a strategy that integrates financial planning with sustainable investments.

"Our heart-felt commitment to putting our clients' needs first drives our high-level, professional approach to financial services."



First Meeting:
Get to Know You

Second Meeting:
Gather Information

Third Meeting:
Present Recommendations

Fourth Meeting:
Implement the Plan

Appointments & Information - 619.698.4330 • Visit us at: www.bluesummitinvest.com



Our Mission

At **Blue Summit Financial Group** we provide peace of mind through disciplined financial planning and socially responsible investment management. Our clients experience a relationship with their advisor that is broader and deeper than with any other professional. Our clients enjoy clarity and confidence knowing they have a sound strategy and an experienced team working to ensure their life goals are being met while helping to create a better world.

*At Blue Summit Financial Group we help you
"Invest for a Better Tomorrow."*



Blue Summit Financial Group, Inc.
Investing for a Better Tomorrow

9001 Grossmont Blvd. | Suite 718 | La Mesa, California 91941

Phone: 619.698.4330 | Toll Free: 888.698.4330

Email: info@bluesummitinvest.com

www.bluesummitinvest.com

Appointments & Information - 619.698.4330

Blue Summit Financial Group, Inc. - Securities offered through Registered Representatives of Cambridge Investment Research, Inc. (CIR), a Broker/Dealer, Member FINRA/SIPC. Investment Advisory Services offered through Investment Advisory Representatives of Cambridge Investment Research Advisors, Inc., a Registered Investment Advisor. Blue Summit Financial Group, Inc. is not affiliated with CIR.



Printed on 100% Recycled Paper, Chlorine-Free, with Soy-Based Inks