Todd M. Luce Montgomery

MBA, CEPA®, CRPC™, AAMS®, APMA®, MSgt (Ret.) USAF

Wealth Advisor, Raymond James Financial Services
Partner, SilverTree Wealth Partners

Work History:

SilverTree Wealth Partners & Raymond James
February 2022 – Present

Edward Jones
Oct 2010 – February 2022

Education: Master of Business Administration
Southern Oregon University

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For the last 14-years, I have been helping individuals aged 50-yrs +, licensed professionals, & businesses make smarter decisions with their finances utilizing a comprehensive wealth management process that encapsulates 1) investment consulting, 2) advanced planning, & 3) relationship management of tenured seasoned professionals. With a deep understanding of the unique challenges & opportunities that come with wealth accumulation, preservation, & transfer, I am dedicated to helping my clients achieve their long-term financial goals & secure their financial future for generations to come.

My Approach:

I am a retired Master Sergeant from the United States Air Force with 2 decades of experience in training & leading enlisted personnel…and did so during austere times of war resulting in being awarded two USAF Meritorious Service Medals, three USAF Commendation Service Medals, & four USAF Achievement Medals.* And, I have learned that established & successful processes lead to success. As such, I take a holistic & personalized approach to wealth management, focusing on building strong, long-lasting relationships with my clients based on trust, transparency, & integrity. By taking the time to truly understand my clients' individual needs, values, & aspirations, I am able to tailor customized strategies that align with their specific goals & objectives. Regardless of the goal, I work closely with my clients every step of the way that includes timely communications to navigate complex financial decisions & optimize their financial outcomes.

Credentials & Experience:

With 15 years of experience in the financial services industry, I bring a wealth of knowledge & expertise to the table. I have earned & hold the following financial credentials:

Master of Business Administration
Certified Retirement Planning Counselor™
Accredited Portfolio Management Advisor®
Certified Exit Planning Advisor®
Accredited Asset Management Specialist®

These designations signify that I am well-equipped to provide best-in-class financial advice & guidance. Additionally, I stay abreast of the latest industry trends, regulations, & investment strategies to ensure that my clients receive the highest level of service & support they deserve.

SILVERTREE
WEALTH PARTNERS

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** United States Air Force (USAF) medals are not based in anyway on my abilities to provide investment advice or management, nor indicative of any future performance. In addition, these medals are not an endorsement & may not be representative of any client experience. Raymond James is not affiliated with the USAF. Raymond James & its advisors do not offer tax or legal advice. You should discuss any tax or legal advice with the appropriate professional.*

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Areas of Expertise:

Investment Consulting: Developing tailored investment strategies designed to grow and preserve wealth while managing risk and volatility.

Tax Mitigation: Implementing tax-efficient strategies to minimize tax liabilities & maximize after-tax returns.

Wealth Protection: Implementing risk management strategies & insurance solutions to safeguard assets against unforeseen events or those who seek to take assets unjustly.

Wealth Transfer: Creating comprehensive estate plans & succession strategies to facilitate the smooth transfer of wealth to future generations.

Charitable Giving: Structuring philanthropic initiatives & charitable giving strategies to support causes that are meaningful to my clients and their families.

Business Exit Planning: Preparing business owners to extract wealth from their business & have a successful 3rd act in post-transition.

Let's Connect: If you are seeking personalized, strategic wealth management solutions tailored to your unique financial goals & objectives, I invite you to schedule a complimentary consultation. Together, we can create a *Roadmap to Financial Clarity* & build a legacy that lasts for generations to come.

WHAT ARE YOUR SPORTS ALLEGIANCES? In order: My alma matter – The Mighty University of Oregon Ducks, Dallas Cowboys, & the New York Yankees.

WHAT ARE YOUR OFF-DUTY PASSIONS? Spending time with my three sons, running, skiing, camping, & authentic BBQ!

WHAT BOOKS ARE YOU CURRENTLY READING? Curriculum for my Certified Private Wealth Advisor® designation.

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