



Samuel Sutterfield and David Martinez Launch Elevate Wealth Management

Experienced financial advisors, Sam Sutterfield and David Martinez, have co-founded Elevate Wealth Management.

TUCSON, AZ, UNITED STATES, April 18, 2023 /EINPresswire.com/ -- Co-founders [Samuel Sutterfield](#) and David Martinez are excited to announce the launch of their new firm, Elevate Wealth Management, based in Tucson, Arizona. With over 20 years combined experience in the financial services industry, Sutterfield and Martinez have a passion for helping their clients achieve their financial goals. The firm is dedicated to providing personalized financial planning and investment management services designed to help clients build and preserve wealth, minimize taxes, and plan for their future.

Sutterfield and Martinez saw an opportunity to make things more efficient in the financial services industry by leveraging small channels that are often inefficiently used. "We saw the opportunity to create a firm that brings structure and process to the industry while maintaining a family-like culture," said Sutterfield, Accredited Investment Fiduciary and Certified Estate & Trust Specialist. "Our goal is to provide personalized service to our clients and make them feel like part of our family."

One of the visions of Elevate Wealth Management is to create an in-house, one-stop shop, by providing features like an attorney on staff. "People don't want to make big decisions, and we want to make it as easy as possible for our clients," said Martinez. "We want to provide them with all the resources they need to make informed decisions about their financial future."

Elevate Wealth Management team is excited to celebrate this accomplishment. Their clientele ranges from medical professionals to school system employees and even Dave Ramsey listeners. The firm also plans to hire bilingual advisors to better assist with Spanish-speaking clientele.

We are excited to build long-lasting relationships based on trust, integrity, and mutual respect," said Martinez. "Our goal is to help our clients achieve financial success while maintaining a family-like culture and providing the highest level of personalized service."

Sam Sutterfield, CES®, AIF®, RFC® was born in Tucson, Arizona, and established his own financial advisory firm in his hometown. He is a graduate of the University of Minnesota and holds a BS in Marketing. As Co-founder and Managing Partner, he leads his team in serving clients with goals-

based financial planning. Mr. Sutterfield has established himself through years of experience, including a term as President and Managing Partner at Modern Wealth Management and as a Registered Representative for Centaurus Financial. Mr. Sutterfield

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To learn more about Elevate Wealth Management, you can visit their website at <https://www.elevatewealthmanagers.com/>

For more information on Samuel Sutterfield, please visit his [Linkedin profile](#).

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