



FOR IMMEDIATE RELEASE

Dream Big. Plan Smart.

Planning for a better future, starts today!

Ashburn, Virginia - December 15, 2016 – Jonathan Peyton, Wealth Manager, and Bruce Klemm, Operations Manager, announce the launch of their independent wealth management firm, Horizon Ridge Wealth Management. Based in Ashburn, the two founding members bring more than 25 years of combined financial services industry experience and over 40 years of business experience. Jonathan, currently holds the CFP® and CDFA® marks while Bruce is currently working towards the CERTIFIED FINANCIAL PLANNER™ certification. Supported by LPL Financial's infrastructure and resources, the firm's research and operations will be extensive and innovative.

“In order to meet our client's needs we deliberately structured our investment and operations departments to be supported by one of the industry leading independent broker dealers,” said Klemm. Designed to provide clients with wealth management services in-person, and online, LPL Financial offers a multitude of resources for financial services firms to streamline where and how they work with their clients.

“It’s very busy around here as we work diligently to bring our clients a true end-to-end financial planning process,” said Peyton. He continued, “Launching this firm was born from a conversation Bruce and I had 10 years ago. Recently, when the firm I was working for closed many of their Wealth Management offices nationally, the next logical step was bring back, at least locally, a face to face presence to the people who wanted it, and turn a 10 year dream into a reality. Between our time working at Fidelity Investments, and my time working for USAA, we estimate we have helped thousands of clients work towards their asset management and financial planning goals.”

The two are striking their brand on a relationship model based in serving the best interest of their future clients. As of late, the term "fiduciary" has become a hot topic in households across the country since the Department of Labor published their "fiduciary standard of care" for advisors when discussing retirement accounts. "If a doctor and lawyer can swear to an Oath to do right by their client, why shouldn't advisors operate off a similar standard," said Peyton. "The

Department of Labor's fiduciary rule opened the eyes of many investors to the reality that an advisor may not always be putting the client's interests first," remarked Klemm. "With companies under public scrutiny for their sales practices, investors are wary of who to trust." Established on the core values of transparency, integrity, loyalty, and compassion, Horizon Ridge Wealth Management adopted the Code of Ethics from the CFP Board of Standards as a way to benchmark their fiduciary standard.

To address their future client's needs Horizon Ridge Wealth Management offers:

- Alternative and Asset Management Services
- Divorce Financial Planning
- Employee Benefit Consulting
- Holistic Financial Planning
- Senior Care Consulting
- Special Needs Planning

About Horizon Ridge Wealth Management:

Horizon Ridge Wealth Management is a holistic wealth management firm. We focus on helping our clients invest wisely and plan for life events such as retirement, divorce, senior care, and much more. It is our belief that financial planning is more than just numbers, it is a roadmap through each stage of life.

Jonathan brings his passion for helping families achieve their life goals to Horizon Ridge Wealth Management. He began his career in finance early, where he worked his way through college processing loan applications for a credit union. He quickly progressed up the ranks to wealth management during his time at Fidelity Investments, and later at USAA. For over 15 years, he has helped people with banking and investment needs, overall financial planning, wealth management strategies and asset preservation concepts.

Bruce brings his passion for helping people do better for themselves to his work at Horizon Ridge Wealth Management. As Operations Manager, Bruce is responsible for firm's operations and strategic planning. Prior to co-founding Horizon Ridge Wealth Management Bruce worked for Ameriprise Financial from 2004 to 2006 and Fidelity Investments from 2007 to 2014, where he then retired in 2014.

Securities and Financial Planning offered through LPL Financial, a registered investment advisor, Member FINRA/SIPC.

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