Creating Innovative Independence

Summation Wealth Group empowers Colorado's most dynamic women and business owners through team-based wealth planning.

Left to Right: Benjamin Harvey, Mike Wechter, Lauren Theken, and Nate Fikse of Summation Wealth Group

"What I appreciate about working with women is their grit and determination," says Lauren Theken, CFP®, CPWA®, AAMS®, private wealth advisor at Summation Wealth Group. "Their focus is on what they are building, and they put their passion and energy into it. It's rewarding to work with women who bring that level of intensity to what they do. I love that energy."

Theken joined Colorado Springs and Denver-based Summation Wealth Group in 2010, bringing her investment focus to a team that had already gained a national reputation with women, executives, and business owners. In the 20-plus years since its founding, the group has evolved to offer clients a comprehensive suite of values-based services, including multi-family office planning to serve Colorado's wealthiest families.

Team Synergy

As a team of financial planning specialists, Theken notes that Summation Wealth Group provides clients—women or not—with guidance throughout every stage of their lives. "We're fortunate to have a large team of specialists, each with our own strengths," Theken says. "Clients know their advisor will pull in these resources at any time, so we don't have to be the expert at everything."

In fact, it was this self-awareness that led Summation Wealth Group to establish a premier multi-family office in Colorado. "The complexities that come with selling a multimillion-dollar business or creating a high-net-worth legacy plan simply can't be accounted for without expertise and thoughtful coordination," explains Benjamin Harvey, CFP®, CPWA®, ChFC®, CLU®, private wealth advisor and founder of Summation Wealth Group.

Whereas traditional financial planning firms follow a product- or advice-led approach, Summation Wealth Group's multi-family office puts high-net-worth women, families, and business owners at the center of planning. Through their team of specialists, they surround clients with guidance and expertise on business, multi-generational, and legacy planning; investment advisory; and more.

"Everyone wants to be financially secure, and when our clients come to us, they're already incredibly successful. They've built a thriving business or are at the top of the corporate world, but the anxiety around exiting the business or career is always present. It's hard to imagine transitioning away from their identity while still providing for themselves and future generations," explains Theken.

Through Summation Wealth Group's deep discovery and coordination, the team helps clients move from a sense of chaos to confidence. And when it comes to business owners, they urge them to start planning at least five years out from retirement. "The first step is getting clear on what they want," adds Harvey. "There's little delineation between exit planning and personal goals. Whether we're helping a business owner plan for a sale or the transfer of their business to key employees internally, every succession plan is unique to that individual."

"There's a lot of nuance in financial planning," Theken says. "Sure, you could just invest your money in an index fund, for example, but there are things that you can do that could have a lot more impact—not just for yourself, but for your family, community, and legacy. The women we work with are really putting their energy into all these facets of life."

Ready to transform your life's work into your life's legacy? Reach out to Summation Wealth Group today.

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