



## Pinnacle View Wealth Management Q3 Newsletter 2025

We are pleased to present our quarterly newsletter to you.

This month's team member spotlight features our Wealth Management Analyst, **Jayden Parkinson**. Further inside, you'll also find insights and ideas for the summer season. As always, if you have any questions, don't hesitate to reach out to anyone on the team for assistance.

### Team Spotlight: Jayden Parkinson

#### My Role on the Team: Wealth Management Analyst

As part of the Investment Team, I work closely with PVWM Advisors to support client relationships through portfolio analysis, investment due diligence, and customized reporting. I focus on bringing a data driven, detail-oriented approach to help ensure our strategies align with each of our clients' financial needs.



#### What makes you passionate about work?

I enjoy finding solutions and helping individuals work through complex situations. Working in wealth management involves both the challenge and satisfaction of helping individuals make progress toward achieving their goals, despite the many unique challenges they face.

#### Hobbies & Interests:

When I am not in the office, I love to be outdoors and moving. This takes many forms, but golf is my favorite way to achieve this. I love being able to experience new locations and being with friends and family as we explore new courses each year.



#### Family Life:

I'm originally from Utah and now live in Gilbert, Arizona. My fiancée, Maria, and I love food and trying new recipes and restaurants around the valley. Most of my family lives in Utah where we love to spend time together enjoying hiking, skiing, or fly fishing in the mountains.



### Summer Insights



#### 27 Fresh Summer Dinner Recipes

Immerse yourself in the flavors of summer with these seasonal favorites featuring fresh tomatoes, peppers, corn, and more.

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#### You've Been Named as Your Parent's Executor. Now What?

If you've been named as your parent's executor, you'll find it's a role with both emotional and administrative tasks. Here are some key guidelines.

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