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BOZEMAN, MT – July 26th, 2023 – Waypoint Wealth Management is honored to announce that Zach Schmidt, Wealth Management Advisor, has been named to the 2023 Forbes Top Financial Security Professionals Best-In-State List.

Forbes and SHOOK Research carefully conduct in-person interviews and review industry experience, compliance records, revenue produced, and assets under management to compile this list of distinguished financial professionals.

“While this is a great accomplishment for myself and my team, it is only possible because of our amazing clients,” says Schmidt. “Thank you for choosing Waypoint Wealth Management to help you take the right financial steps today, and every day after, to get closer to your dreams.”

Waypoint Wealth Management has built an award-winning track record by preparing personalized, multi-faceted plans that focus on what’s important in their clients’ lives rather than on their net worth.

Schmidt, 39, is a Bozeman native and resides here with his wife and four sons. His mission is to help others live with freedom and purpose through a personalized approach to financial planning. “We are passionate about serving our clients,” he says. “We would love the opportunity to set you on a course for long-term financial security.” To learn more, please call his office at (406) 522-4760.

