



**Specializing in Dentists  
and their practices**

# ARISTA

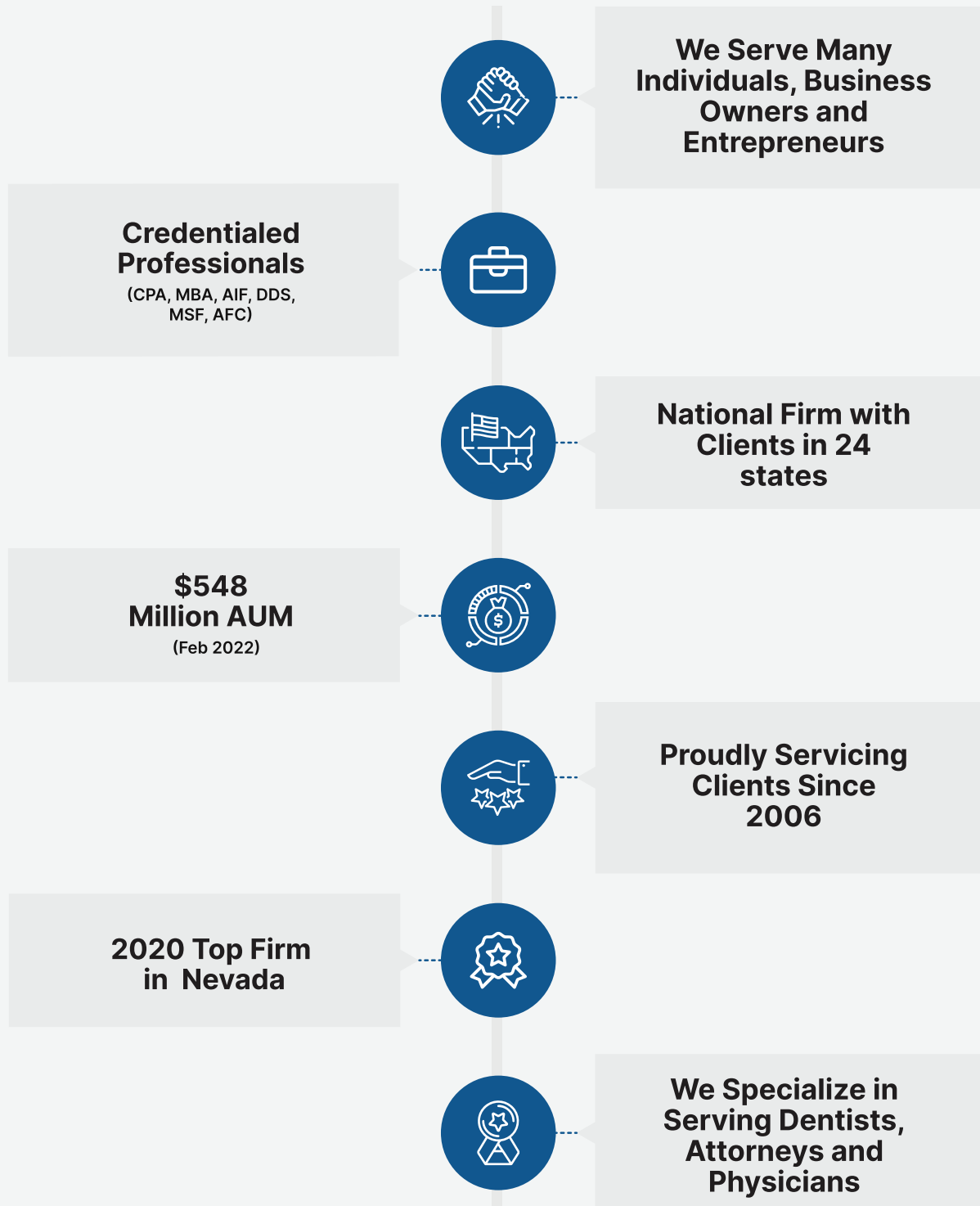
WEALTH MANAGEMENT

We focus on your wealth,  
so you can focus on  
your dreams

[www.aristawealth.com](http://www.aristawealth.com) | (702) 309-9970 | (877) 309-9970

# About Arista Wealth

As an independent fiduciary firm, our purpose is to **empower you** to discover and meet your financial goals.







## Values

1. Act With Integrity
2. Stay Loyal
3. Be Positive
4. Go the Extra Mile



## Mission

Arista is a high performing firm built on **precision and details**. We are committed to serving successful individuals, professionals, and business owners. We foster meaningful relationships based on **trust, integrity** and exceptional **client service** and help our clients plan, achieve, and **succeed** in their financial and life goals.



## Vision

We are a leader in the Wealth Management Industry while serving individuals and professionals across the nation through communication, commitment, client care and confidence.

# Points of Difference



**Exceptional  
Client  
Experience**



**Holistic  
Financial  
Planning**



**Customized  
Investment  
Strategies**



**Credentialed  
Professionals**

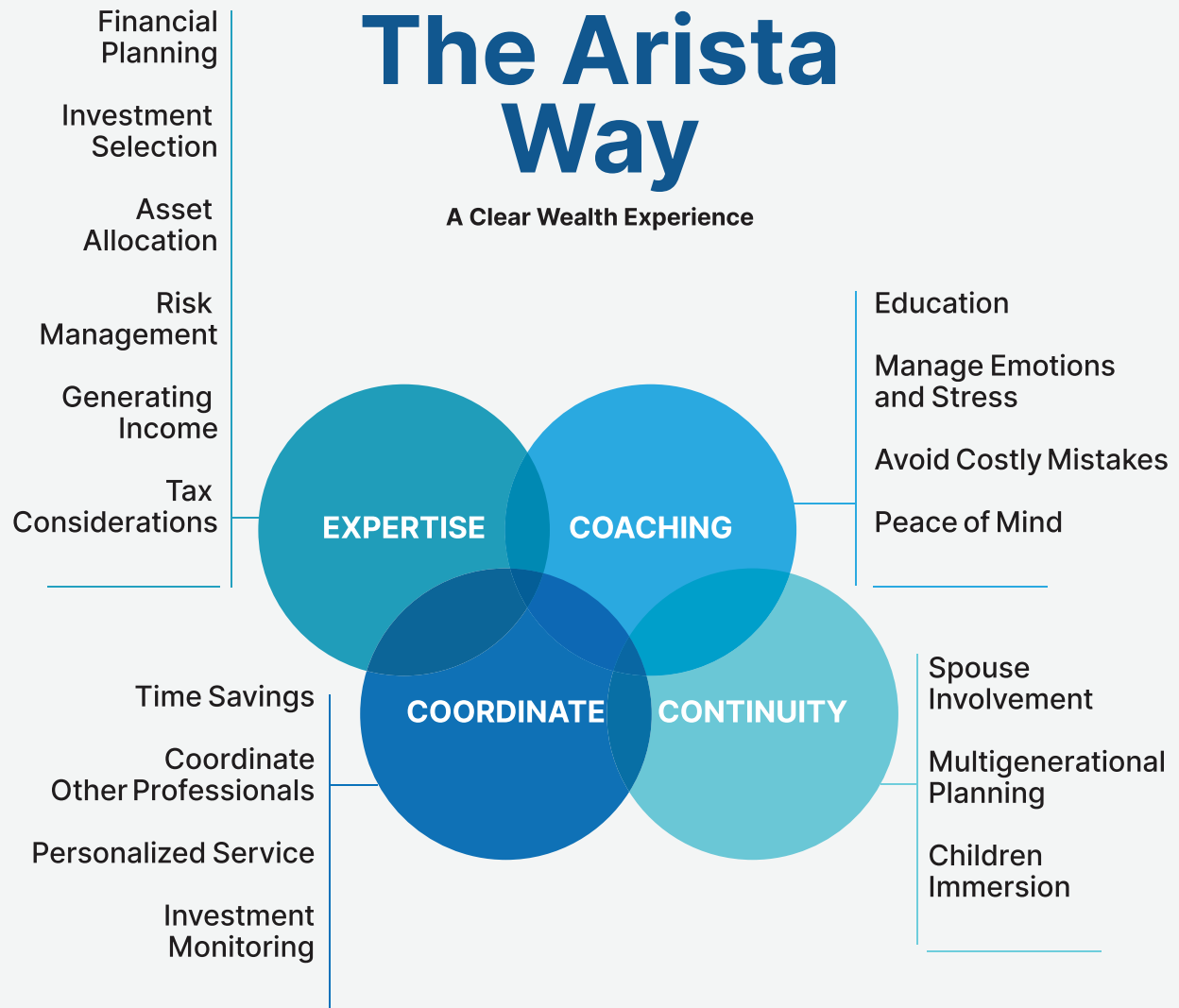


**Focus on  
Your Goals**



**Fiduciary  
Advisors**





# Our Services



**Asset Management**



**College Planning**



**Retirement Plans**



**Life Insurance Reviews**



**Estate Planning**



**Business Consulting**



**Tax Planning**



**Cash Management**



# The Team



**Paul L. Moffat, MBA, AIF®**  
President & Senior Financial Planner



**Martin Lewis, CPA**  
Vice President & Tax Planning



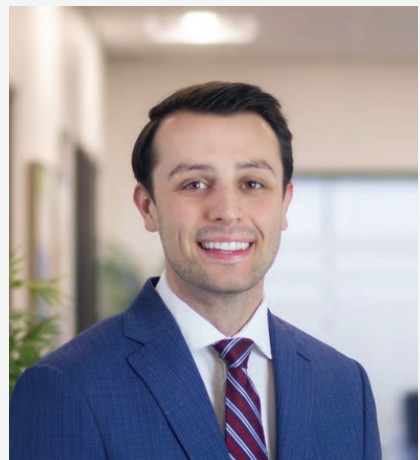
**Lisa Bacon**  
Director of Client Services



**David Boyd, AFC®**  
Financial Planner



**Nicole Penner**  
Director of Operations



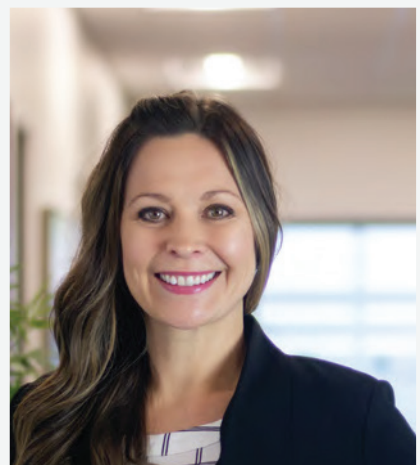
**Zachary Taylor, MSF, AIF®**  
Portfolio Administrator



**Dr. Larry Call**  
Wealth Advisor



**Emma Gazinski**  
Front Office Coordinator



**Brooke Rouse**  
Client Service Specialist



# Contact us



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WEALTH MANAGEMENT

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