Triumph Wealth Management LLC

From the top: 1) Matt Noel, Nathan Brinkman, and Zac Mulford. 2) A brand promise. 3) Kayla, Alyssa, Chris, Nathan, Zac, Matt, Kim, Courtney, and Molly pose in purple. 4) A recent team outing.

15 YEARS

TRIUMPH WEALTH MANAGEMENT LLC

15 years goes by fast. The ups and downs have been vast, but a thriving and hardworking team we have cast.

Triumph Wealth Management was launched in 2007, which would turn out to be a less-than-ideal time to start a new financial services firm. We've now survived — and thrived! — through the Great Recession and the current global pandemic. Triumph has grown organically over the past 15 years by investing in our clients, their lives, their families, and their personal and financial goals. From the beginning, founder and President Nathan Brinkman has assembled a team of hardworking staff and industry-leading resources. Our advisory team grew in 2021 to include two other sharp and compassionate financial advisors, Zac Mulford and Matt Noel. Our entire team is made up of great listeners who seek to fully understand our clients' circumstances.

OH, THE PLACES OUR CLIENTS WANT TO GO. SOME WANT TO GO FAST. SOME WANT TO GO SLOW.

Goal setting, alignment, execution: We help business owners and executives in four ways: retirement planning, financial planning, business succession; and investment strategies. We help clients take a deep dive into their entire financial picture, align their personal and professional objectives, and then implement products and support to fulfill those goals. We like to think our guidance helps clients sleep better at night and live more intentionally.

A DIRECTION IN MIND. WE PARTNER TO FIND. ALL WHILE BEING KIND SO OUR CLIENTS DON'T FALL BEHIND.

No two clients are the same. Common life events like moving, marriage, having children, and growing and sunsetting your business can affect your existing approach. We work with our clients to develop a comprehensive plan and then regularly review the results to help ensure that the plan remains aligned with their objectives and is appropriate for their circumstances. Nathan, Zac, and Matt take an authentic, personalized approach. No two clients are the same, and we tailor our strategy to each client's situation.

CREATE A PLAN FOR YOU AND YOUR HONEY. FOCUS ON THE MONEY. RETIRE SOMEPLACE SUNNY.

It starts with planning. We are excited to celebrate our 15-year milestone and want to throw an anniversary party with you! We are making 2022 a year to focus on you — helping you calibrate your goals and dreams, aligning your finances with your values and priorities, and taking a holistic approach to your financial well-being. Contact team Triumph to review your financial situation and lean on our 15 years of experience.

MONEY CAN GO UP. MONEY CAN GO DOWN. OUR GOAL IS TO ENSURE YOU DON'T FROWN.

It's not just about money. Triumph Wealth Management regularly sponsors charitable events around the Madison area, and we assist our clients when they wish to include philanthropy into their financial plans. We hold a strong belief that doing business the right way leads to personal and professional satisfaction with relationships and in life. Reach out to Nathan, Zac, or Matt to learn more.

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