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# Moving Forward Together

**Williams & Townsend Wealth Management Partners** serves as a trusted advisor to high net worth clients by offering personalized service and education.



In an ever-changing global economy, successful wealth management requires more diligence and expertise than ever before. High net worth individuals need specialized advisors with the skills to navigate today's market and effectively plan for tomorrow.

Enter Williams & Townsend Wealth Management Partners, where managing directors Steven G. Williams, CPA, CRPC®, CFP®, Kevin S. Townsend, CFP®, CRPC®, CPA, and their team have the education and experience needed to grow and transition wealth between generations. With decades of experience, they serve as trusted partners for life's many transitions, decisions, and questions.

"We help clients make the best use of their wealth during their lifetime and ensure that wealth endures for the generations, but we're more than just wealth managers: We're a single-source advisor and networking resource," explains Townsend. "When clients want to send a child to college, buy a luxury vehicle, sell a business, create structured philanthropy, or find an attorney or surgeon, we're their first call."

## Planning Through Transitions

"Our move to Raymond James was entirely for our clients'

benefit," says Williams, a second-generation wealth manager with a three-decade career. "Like us, Raymond James values people first, boasts a long history of strength and stability, and embraces methodical decision-making and comprehensive, long-term planning. The firm's values and extensive resources set our clients up for continued growth and success."

The practice now has more assets under management than prior to the move, an achievement Townsend attributes to mutual trust,

integrity, and—above all—personal relationships.

"We have longstanding client relationships that are impossible to replace," he says.

Clients' loyalty extends beyond business, too—working with Williams & Townsend is often a multigenerational family affair. "We are dedicated to assisting families as they grow," Williams explains. "We've now created goal-focused wealth management strategies for third and fourth generations."

While proud of past achievements and client longevity, the Williams & Townsend team values continued education. "We never stop learning," says Townsend. "We'll walk clients through their financial plans in as much detail as they desire."

This client-centric philosophy is successful in its own right; both managing directors have been named *Forbes* Best-In-State Wealth Advisors in 2018, 2019, 2020, and 2021. But they say real rewards come from seeing clients fulfill goals.

"We're passionate about our clients achieving everything they envision in life," says Williams. "This is more than a job; it's a calling. We're helping people reach their dreams."

**WILLIAMS & TOWNSEND**  
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The *Forbes* ranking of Best-In-State Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of seven years of experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience, and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Out of approximately 32,725 nominations, more than 5,000 advisors received the award. This ranking is not indicative of an advisor's future performance, is not an endorsement, and may not be representative of individual clients' experience. Neither Raymond James nor any of its Financial Advisors or RIA firms pay a fee in exchange for this award/rating. Raymond James is not affiliated with Forbes or SHOOK Research, LLC. Please visit <https://www.forbes.com/best-in-state-wealth-advisors> for more info.

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