

A Clear Path for Your Financial Future.

We help individuals, families, and business owners organize, manage, and plan around the financial decisions that matter most, with a mission to individualize every relationship to create a community of confident, informed, and inspired retirees.

\$1.1B +

ASSETS UNDER
MANAGEMENT ⁽¹⁾

29 YRS

ADVISOR EXPERIENCE ⁽²⁾

CRPC®

CERTIFIED ADVISORS ⁽³⁾

RIA

REGISTERED INVESTMENT
ADVISOR

01 WHO WE ARE

Weaver Consulting Group is an independent wealth management firm built around long-term client relationships, disciplined investment management, and practical financial planning.

Led by Jason and Travis Weaver, our team works with clients who want experienced guidance, clear communication, and a coordinated approach to managing wealth.

03 HOW WE HELP

WEALTH MANAGEMENT

Protect and manage wealth with an investment strategy tied to your goals, time horizon, risk tolerance.

RETIREMENT PLANNING

Prepare for the shift from work to retirement with income planning, withdrawal strategy, risk review.

02 WHO WE HELP

- › Individuals preparing for retirement, or already retired
- › Households managing significant savings, investments, or concentrated wealth
- › Business owners and executives balancing personal and company decisions
- › Families planning across generations

FINANCIAL PLANNING

Organize cash flows, savings, insurance, investments, and major decisions. Support the retirement and legacy you want.

401(k) & EMPLOYER RETIREMENT PLANS

Guidance for business owners and organizations managing 401(k) and employer-sponsored retirement plans.

04 WHAT WORKING WITH US LOOKS LIKE

Introductory Conversation

Discovery & Organization

Planning & Recommendations

Ongoing Guidance

Thinking about making a change?

Start with a brief introductory conversation. No pressure, no obligation – just a chance to understand your goals and see how we may be able to help.

SCHEDULE A CONVERSATION

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