

ARIZONA FINANCIAL



FROM LEFT TO RIGHT: Carla Gladden, Branch Operations Coordinator; John Chapman, Financial Advisor; Micah Crabtree, Wealth Advisor, RJFS | Founder, Elevated Wealth Management Group; Kylee Young, Client Service Associate; and Megan Woods, Client Service Associate.

Managing What Matters Most

When helping business owners, executives, and affluent families navigate major life transitions such as retirement or business exit planning, Elevated Wealth Management Group takes a relationship-driven approach to planning that prioritizes what matters most to each client.

At Elevated Wealth Management Group, the planning process starts with the person—not the portfolio. Just as no two clients are the same, their financial plans shouldn't be either. The needs of a business owner preparing to sell a company can look very different than those of an executive preparing for retirement or a family seeking to maximize its philanthropic impact.

The Arizona-based firm takes a thoughtful, personal approach it calls “relationship-driven,

planning-focused wealth management,” with an emphasis on understanding each client's goals, concerns, family, and vision for the future.

“It's about building deep relationships; that's how we help clients achieve what matters most,” says Micah Crabtree, CFP®, CRPS™, CEPA®, wealth advisor and founder. “We start with a discovery meeting where we ask questions designed to understand not just where someone is financially, but where they want to go and what they want their wealth to accomplish.”

Rallying the Troops

From business planning and estate considerations to retirement income and family legacy, Elevated Wealth Management Group works to bring the different pieces of a client's financial life together.

One of Crabtree's biggest pieces of advice for people preparing for a major transition is to build their team early. For complex events such as a business exit, he recommends beginning the planning process at least five years in advance.

“Business owners shouldn't wait until they're ready to sell to start planning,” Crabtree says. “The earlier you start, the more opportunities you have to improve the business, prepare yourself and your family, and ultimately create more options for how you transition.”

Because complex financial decisions rarely exist in isolation, Crabtree has intentionally built a team and professional network designed to provide clients with a high level of service and coordination.

“I've intentionally built a team that allows us to deliver a high level of care to our clients,” says Crabtree. “It also gives us the depth and continuity to support our clients, our business, and our team members well into the future.”

Elevated Exit Plans

As a Certified Exit Planning Advisor and business owner himself, Micah Crabtree understands the high stakes involved in transitioning a business. For many business owners, their company represents the majority of their net worth—and often their largest source of income, retirement security, and family legacy. Crabtree and his team help owners look beyond the transaction itself, coordinating tax, investment, retirement, estate, and exit-planning strategies to help protect the value they've spent years building.

“For many business owners, their business is their largest asset,” says Crabtree. “Our job is to help them turn the value they've spent decades creating into the financial freedom and legacy they've envisioned.”

In February 2027, Elevated Wealth Management Group will host its inaugural Elevated Business Owner Summit, bringing together business owners and experienced professionals to explore succession, value creation, and exit planning.

“We're here to help business owners protect their entire life's work and align it with what matters most to them,” says Crabtree. “I love the puzzle of understanding how different strategies can come together for each individual.”



Micah Crabtree, Wealth Advisor, RJFS | Founder, Elevated Wealth Management Group



928-476-7282
elevatedwmg.com