Wade Carpenter | Biography

Wade Carpenter

Making a Meaningful Impact Through Executive Wealth Management

You may know Wade Carpenter as a senior partner at Infinitas, but few people know the story of his career and his values. He's a leader, a husband, a father, and a self-made man who's persevered through life's challenges to become successful.

From the Ozarks to Opportunity: A Determined Start

Like many of us, Wade comes from humble beginnings. He was born in rural southern Missouri to a lower-income family. But even when he was just a child, something in his heart told him he was destined to achieve meaningful things. He knew one day he'd see more of the world than his small town. He also knew getting an education was how he'd get there.

"I got to college and was poor," Wade says. "The thought of investing was an unknown world to me, but I knew I wanted to graduate college and make money."

After learning about investing in college, Wade soon became fascinated by the idea of compounding money, as he'd never had any. Armed with this knowledge, he saw an opportunity to improve his situation while helping others. He paid his way through college with work study, and in 1989, graduated from Central Missouri State University. But, his years of hard work had just begun.

Wade graduated college on a Friday, moved to Kansas City on Saturday, and started a new job Monday morning. He led a focused lifestyle; he made cold sales call all day at work, then made more calls from home at night. His no-frills apartment did not have appliances, so he used an Igloo cooler for a refrigerator and an electric skillet to cook meals. His student loans and lack of a financial safety net drove him tirelessly. His work ethic hasn't waned since.

In 1992, Wade began working as a financial advisor at Legacy Financial Group, where he would eventually become a partner. In 2006, he became the owner of Summit Wealth Advisors, LLC, which merged with Infinitas in January 2017, making Wade senior partner.

Because Wade sees his education as the key to his success, he puts a constant emphasis on it in his career. He has achieved many accomplished titles through certifications and designations, including Certified Financial Planner™ (CFP®), Certified Family Business Specialist (CFBS), Chartered Financial Consultant® (ChFC®), and Chartered Life Underwriter® (CLU®).

Wade is a member of the Financial Planning Association and the National Association of Insurance & Financial Advisors. He has served on the board of a local nonprofit organization, Community LINC, and the Epsilon Iota chapter of Phi Sigma Kappa. He also applies his business acumen in his community—he has served on the finance committee and is currently serving on the personnel committee at his church.

Financial Advisement as Service to Others

Not only has Wade worked hard to meet his career goals, he wants to help other people live more meaningful lives through financial planning.

“I consider it a privilege to serve people. It is an honor and a responsibility.”

Wade has helped generations of families plan for the future, often advising clients’ children and grandchildren as they start families and careers of their own. His planning and advice support clients in the good times and in the bad. For instance, when a family lost its primary income earner, Wade was there as an advisor and friend to deliver the life insurance payout check. At a time when the surviving spouse and children were so overcome with grief that they couldn’t possibly focus on their financial needs, this made all the difference in the world.

All it takes is a little caring—a rarity in service these days—and the personal attention to get to know clients and help them realize what they truly want to achieve with their wealth.

“Hardly anyone in our society asks or sincerely cares about the lives of others anymore,” says Wade. “We ask our clients, ‘What’s most important to you?’ because we really care.”

The answer to this question also helps you lay out your financial goals more clearly, Wade says. Sometimes, clients find success doesn’t mean buying a bigger house or more clothes. It may mean the ability to spend more time with loved ones or engage with a charity that leaves the world a better place.

A Life Well Lived, a Future Well Planned For

In a world that focuses on material success, Wade is most proud of his family. He’s been married to his wife for 26 years, and they have three daughters. By working hard, Wade has given his family more financial stability than he had growing up, and he spends every day helping others do the same thing.

Wade knows what it’s like to feel a calling and go after it with everything you have. He knows what it’s like to struggle and keep going. He also believes that managing your financial legacy means keeping sight of what makes life meaningful for you. Being able to share that thoughtful advice with executives like him makes all the hard work worthwhile.

If you're looking for expert financial advice from a professional who truly cares about you and your family's well being, reach out to Wade and the Carpenter team at Infinitas. Get started on making your wealth management goals come true today.

LinkedIn Version

I've worked with countless executives over my 25-plus year career as a financial advisor to help them manage their wealth and achieve their financial goals. As a husband, father, and self-made man, the service I provide is shaped by my personal, educational, and professional experiences.

Even as a child growing up in a lower-income home in rural southern Missouri, I felt destined to achieve meaningful things. I knew my key to doing that was an education. Paying my way through college, I graduated in 1989 from Central Missouri State University. Since then, I've worked tirelessly to secure a financial legacy for my family, including my wife of 26 years and three daughters, and to help others do the same for their families.

I worked as a financial advisor and eventual partner at Legacy Financial Group for several years before starting my own firm, Summit Wealth Advisors, LLC, in 2006. In January 2017, we merged with Infinitas, where I am now senior partner.

I view education as integral to my success, so I am always looking to learn in my career. I've achieved many titles through certifications and designations, including Certified Financial Planner™ (CFP®), Certified Family Business Specialist (CFBS), Chartered Financial Consultant® (ChFC®), and Chartered Life Underwriter® (CLU®).

I am a member of the Financial Planning Association and the National Association of Insurance & Financial Advisors. I serve on the board of a local nonprofit organization, Community LINC, and the Epsilon Iota chapter of Phi Sigma Kappa. I also have served on the finance committee and am currently serving on the personnel committee at my local church.

My mission is to help others lead meaningful lives through financial planning. I consider it a privilege to serve people. It's an honor and a responsibility. When my team and I work with clients, we get to know them, learn about their families and lives, and ask: "What's most important to you?" Whether it's spending more time with your family or engaging more with a charity, by answering that question, you can see your financial goals laid out more clearly, and we can help you achieve them.

I know what it's like to feel a calling and go after it with everything you have. I've struggled and kept going. I believe in managing your financial legacy while keeping sight of what makes life meaningful for you. It's this financial advice that underscores the service I bring to all of my executive clients.