



*Our Mission: To Provide Peace of Mind through  
Comprehensive Wealth Management Services*

**Strategent Financial, LLC** is a registered investment advisory firm providing wealth management and tailored advisory services to a select group of clients.

## Client Focus

Strategent Financial primarily serves a select group of high net worth individuals and families, businesses, 401(k)'s, and non-profit organizations. Our clients receive tailored solutions specific to their unique situations. **Find Out More »**

We believe that financial success is dependent upon having a comprehensive strategy which begins with a solid investment plan. Our client strategies are specific to their unique situation and goals. **Find Out More »**

## Independent & Fee-Only

Strategent Financial is an independent registered investment advisory firm. We provide access to a broad range of investment solutions and are not tied to any one brokerage or investment firm. **Find Out More »**

## 401(k)'s

We help businesses with investment and retirement planning through 401(k) accounts. Our 401(k) solutions assist businesses by providing their employees with options to help them work towards their retirement goals. **Find Out More »**

Dale Lam, founder and President, explains more about Strategent Financial, our philosophy, and our mission.

Strategent Financial primarily serves a select group of clients, primarily high net-worth individuals and families, businesses, 401(k)'s, and non-profit organizations. Our clients receive tailored solutions specific to their unique situations.

#### Contact Us

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