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We're Here to Make a Difference for You, Your Family and Your Future

Veliz Financial Management is located in the heart of Fircrest. Our mission is to become your financial advisor partner.

Getting to know you and understanding your personal needs allows us to create a *customized wealth management strategy* aligned with your short and long-term goals. By building a lasting, personal relationship with you, we can be your guide as your financial goals and concerns change over time.

Our process is to create a personalized financial strategy with your lifestyle goals in mind. Based on our discovery process, we build an appropriate plan that supports your objectives and monitor it regularly to help you stay on track.

Business owner Jose (Joe) Veliz has resided in the Tacoma area since 1969, graduating from Lakes High School class of 1971. Before his financial advising career he was a contract manager with the Boeing Company; in 1993 Joe became a Financial Advisor and has dedicated 24 years providing personalized service to individuals, families and institutions. Joe holds a Master's Degree, Series 7, 63, and 65 registrations through LPL Financial and a Life/Accident/Health Insurance license from the State of Washington.

As an active community volunteer Joe has served on the Board of Trustees at Clover Park Technical College, recognized for outstanding accomplishments and designated alumnus (2002). He also served as a Board of Trustee member at Charles Wright Academy. Served as President Tacoma Narrows Rotary Club (2014-2015) and currently serving on the Board of Directors, Community Health Care.

Bonds and Bond Mutual Funds 101

Investing in bonds and bond funds can help you pursue financial goals, but consider the risks and rewards first.

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