

Strategic Capital Wealth Management

(951) 233-6319

Making Your Future a Success financial services

Plan for tomorrow today!

Financial Services



Planning Futures

We have years of experience helping clients prepare for the unknown while meeting their financial goals.

Ask us about:

- Financial planning
- Investment advice
- Retirement planning
- Education funding
- Estate planning

As an independent financial services firm, we can access many different products so you can get the right products and services for you.



Comprehensive Approach

We use proven finance strategies designed to meet your risk tolerance and stand up against market volatility. And you can count on unbiased recommendations and impartial guidance based directly on your needs and goals.



Committed to Service

Every successful financial strategy starts with an excellent client relationship. Our mission and values include exceeding our client's every expectation. Call us today to find out how we can suggest long- and short-term strategies that will help you realize your financial dreams.

What We Offer



Strategic Capital Wealth Management

Offers the services our clients need with many investment options. Investment management is guided by your overall financial plan, your timelines and values. As fiduciaries and advocates to our clients, we take pride in our independent and objective guidance. We believe, that designing your ideal financial life, following sound wealth management principals, is a wise investment. And as with any other investment in your life, you would want to know the cost ahead of time, so you can decide if the value you receive, is congruent with the cost.

Annual fees for Investment Management are based upon the assets-under-management. Fees are calculated based on total assets managed, not per account. Fees are always transparent and will be clearly detailed on your statements.



Experienced Planner

Having worked in the financial services industry since 1978, over the past 30 years the financial services industry has made significant technological advancements for wealth advisors when it comes to financial planning, retirement planning and investment management. Many of the manual processes have been automated through software innovation. Now we are able to deliver state-of-the-art wealth plans and investment management services at a fraction of the time commitment and cost it would have been just 10 years ago. The industry as a whole is much more efficient, thus enabling Strategic Capital to pass along these efficiencies and resulting cost savings to our clients.



Meet Celeste

Celeste K. Wall is a Registered Investment Advisor with Dynamic Wealth Advisors, a RIA Firm and founder of Strategic Capital Wealth Management, LLC.

She has been in the financial services industry for over 35 years. While attending USC, as a Business Administration major earning her BS degree in 1981, she started her career in banking at Bank of America as a bank teller. She has been the assistant manager of a community bank, as well as a Small Business Administration Business Development Officer at Wells Fargo Bank.

To better serve her clients, she obtained her FINRA series 6, 7, 63 and 65 registrations as well as her California Life and Health insurance licenses and joined Trilogy Financial Services, as a financial advisor in 2009. At Trilogy Financial Services she became Vice President of Investment and was one of the top producers for the Corona office being awarded Trilogy's *"2012 Woman of the Year."*

In addition to helping her clients financially, one of her greatest achievements is the creation of Friendship Baptist Church Saturday Academy in 2002 designed to assist students in grades 6-12 to be prepared for college. The program successfully graduated 100% of its students to go to college across the country.

She has been a member of Friendship Baptist Church since 1979.

Celeste has been married for over 30 years to her college sweetheart Lonnie Sr., with three married adult children and 4 grandchildren.

Contact Us

Get Started Today

Strategic Capital Wealth Management

12345 Mountain Avenue, Chino, California 91710, United States

Clients often take advantage of meeting with Celeste at her Ontario office or at other locations that are most suitable and convenient for you.

Hours

Monday - Friday: 10am - 5pm

Saturday: By appointment

Sunday: Closed

EMAIL

Strategic Capital Wealth Management

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Celeste Wall is an Investment Advisor Representative with Dynamic Wealth Advisors dba Strategic Capital Wealth Management LLC. All investment advisory services are offered through Dynamic Wealth Advisors. A copy of Dynamic Wealth Advisors' ADV Part 2A Firm Brochure is available upon written request and can also be found on the Securities and Exchange Commission website at <https://adviserinfo.sec.gov/IAPD> by searching under crd #151367.

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