LifeStone FAMILY OFFICE

Wealth Management for Dentists & Business Owners

Advice that Helps You Reach Your Goals

What's Your Risk Number?

How Our Wealth Management Process Works

1. We Learn What Matters

At our Discovery Meeting, we explore how best to help you achieve your most important goals. We'll look at where you are now, where you want to go, and any gaps or obstacles that stand in your way.

2. Get a Plan

At our Investment Plan Meeting, we'll walk you through the plan and share with you investment strategies to help you maximize the probability of achieving everything that is most important to you and your family.

3. Track Your Progress

If we decide to work together, we then address concerns in key areas beyond investments,. We're with you every step of the way, tracking your progress and helping you continue to achieve your goals.

What Makes LifeStone So Different?

At LifeStone most of our clients just want to ***take better care of the people they love and support the causes they care about.*** In order to do that, you need help in solving your unique financial needs. The problem is most financial advisors focus more on your investment portfolio than your overall goals. That can make you feel frustrated and misunderstood.

We believe you deserve to have your hard work pay off and should be working with an advisor that implements strategies that helps you reach your goals. We understand that change can be terrifying, which is why we've created an ***easy to follow process that has helped many dentists and business owners reach their goals.***

Here's how it works. First, we learn what really matters to you, then we give you a plan, lastly, if we decided to work together, we track the progress that you are making towards achieving all that is important to you.

To get started, request a meeting, so you can stop wondering if you are on track to reach your goals & instead, enjoy making a difference in the live of those you love and the causes you care about.

AS FEATURED IN

DENTISTRY TODAY

ADA
American Dental Association

Dentistry iQ
The Web's Most Comprehensive Resource for Dental Professionals

SGVDS
San Gabriel Valley Dental Society

Kern County
DENTAL SOCIETY

DE
DENTAL ECONOMICS

What Do Your Services Cost?

How much is a professional advisor that focuses on investments only costing you? How is not having a plan for minimizing taxes, taking care of your heirs, preserving your assets, and supporting the causes you care about costing you? A lack of clear plan for reaching your goals may already be costing you a great deal.

There is no obligation for our initial consultation. Because we have not yet developed our specific recommendations for your plan, it's impossible to know the exact costs before meeting with you. However, at our second meeting—the Investment Plan Meeting—we will be able to provide you with details on the fees and will be happy to review those with you.

Request a Meeting

Bakersfield
(661) 368-0947
4900 California Tower B, 2nd Floor, Bakersfield, CA 93309

Northridge
(818) 534-4949
18919 Nordhoff St, Suite #6C
Northridge, CA 91324