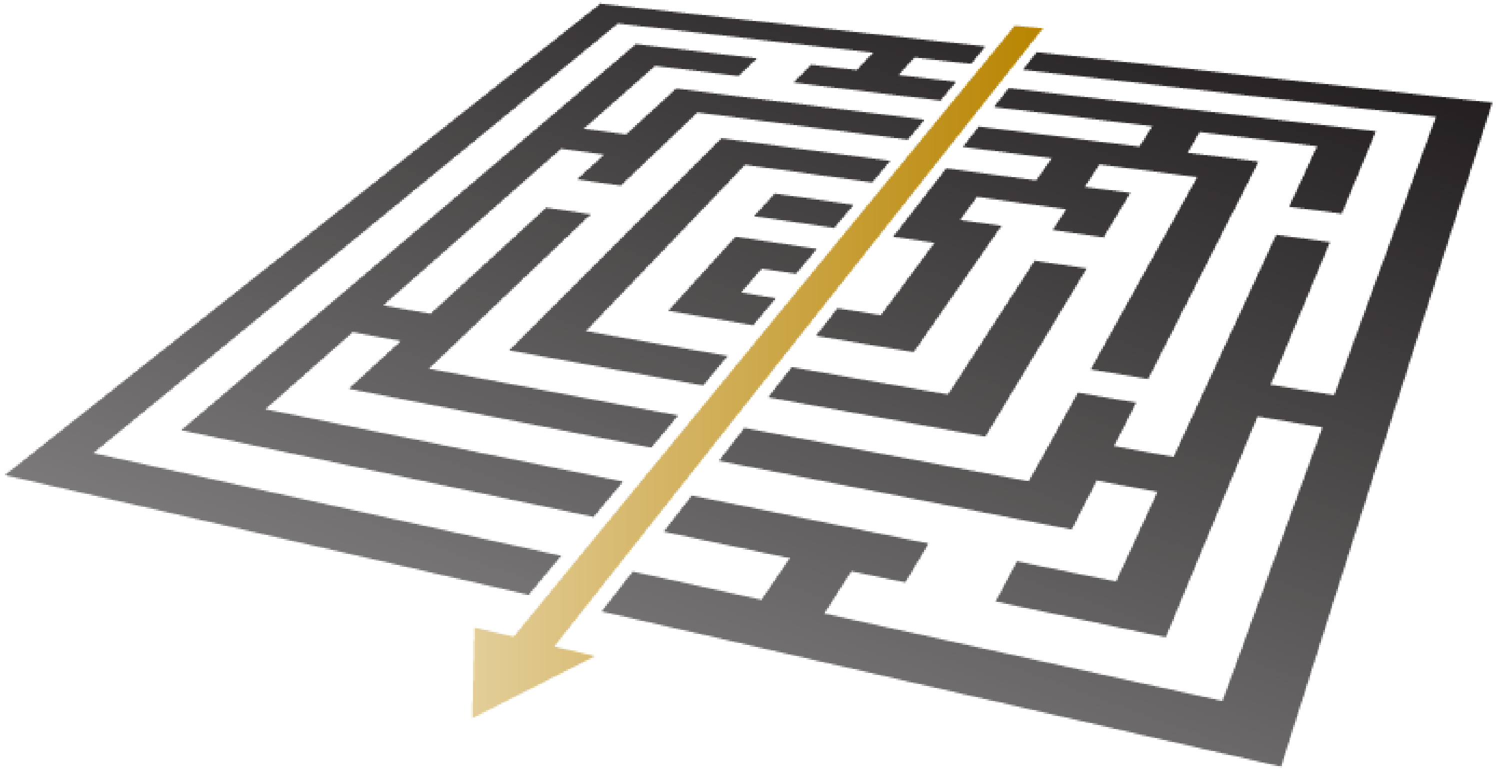


MONEY DOESN'T HAVE TO BE COMPLICATED.

Are you confused by most financial advice? If so, you're not alone.

What makes us different

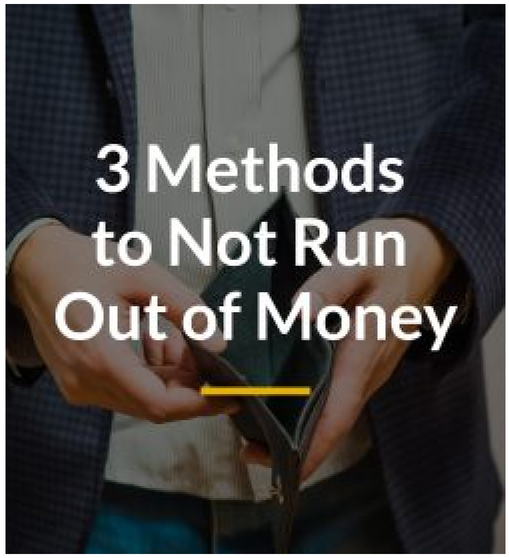
Schedule an appointment

Effective Game Plan

Advice in Common Language

Straightforward Fees

Download one of our free g


3 Methods
to Not Run
Out of Money


4 Common
Mistakes
People Make
With Their
First Million


7 Secrets to
Accumulating
Your First
Million

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FORBES TOP-RANKED TEAM

People deserve to understand what's happening with their money.

Have you ever sat across from a financial advisor and only understood every third word they were saying? And yet they were talking about your money, your life, and your future.

At Graves Financial, we believe clients should underst

that is h

good about explaining investments as they are at mak

+ What are you going to do with my money?

+ Can you handle the complexity of my situation?

+ How can you make my life easier?

Discover the right investment strategy for you.

Tell us a little more about your investment objectives and level of comfort with risk.

By what percentage do you expect your portfolio to grow annually over the long-term (10+ years)?

0-2%

2-4%

4-6%

6-8%

Next

How to get started.

1. Schedule an appointment

2. Meet with us for a custom listening session

3. Get your personalized strategy

Schedule an appointment

Watch video

Please provide your name and email and we will have an a

First Name*

Last Name*

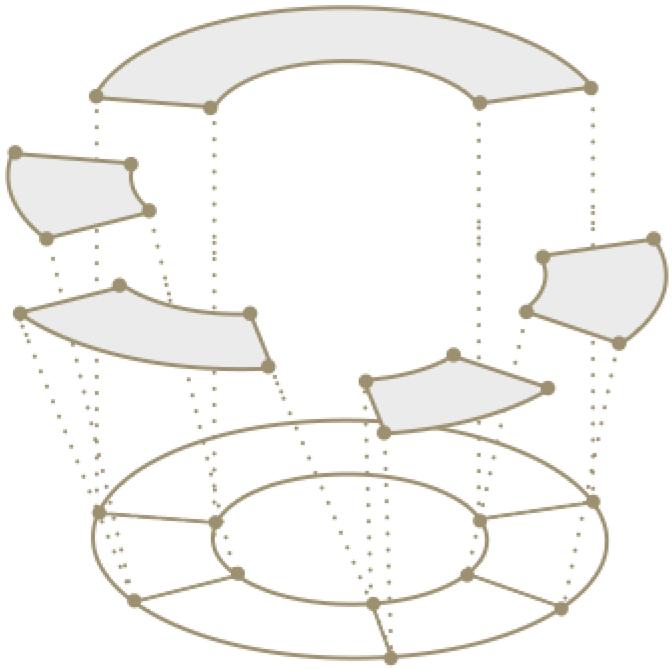
Email*

Phone Number*

Submit

Our financial planning services are built on trust, transparency and accountability.

Our experienced team of professionals will develop a personalized plan that gives you the power – and a path – to realize your dreams. Explore services



Personalized Financial Management

Graves Financial's mission is to inspire our clients to pursue their True Wealth (desired goals in life and through legacy). We do this through education, communication and personalized service that exceeds their expectations. We are a financial management firm in Glendora, CA serving affluent families, business owners, executives and institutions. Our team provides a high level of service for our local and national clients in financial planning and investment management. Contact us today and let Graves Financial help you on your True Wealth journey.

Investment Management

Disciplined investment strategies are the foundation of our investment management process. Our time-tested strategies are designed to meet a variety of investment goals and objectives.

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Carson Partners

Carson Partners are growth-minded advisors wholly dedicated to helping clients reach a higher purpose for their wealth and design a lasting legacy for their families.

Our Locations

Headquartered in Glendora, California, Graves Financial serves affluent families, business owners, executives and institutions. Contact us today to speak with a financial advisor or financial professional nearest you.

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Insights

Graves Financial’s team of professionals provide you with transparent and proactive communications to equip you with the knowledge you need. Read more

News

BUSTING TH

A few years back, I conducted and published research in the *Planning* that showed Americans don’t understand reverse respondents scored below 50 percent on a 10-question

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Blog post

HOW TO BUY A CAR WITHOUT LOSING YOUR MIND (OR YOUR WALLET)

By Erin Wood

Having to buy a car is like having a sliver stuck under my fingernail. It’s painful and annoying, I know I have to deal with it, but it’s going to take forever. Might as well pack a lunch too, because the second you decide you want to test drive something they have you trapped.

Read more

Weekly Market Commentary

WEEKLY MARKET COMMENTARY – JULY 1, 2019

The S&P 500 slipped slightly last week after reaching a new high the previous week. The S&P 500 declined 0.3%. The MSCI ACWI inched 0.1% higher, and the Bloomberg BarCap Aggregate Bond Index rose another 0.4%. Yields continue to fall as expectations of an interest-rate cut mount.

Read more

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