



We provide Personal Finance services including...

Financial Planning

Expecting a newborn child? Early retirement? Buying your dream home? Funding a college education? — life moments that provide great joy, but come with so many financial questions. Don't worry, we're by your side to guide you through every step.

Investment Management

Want to reduce risk, reduce taxes, and reduce fees? We build custom strategies to tilt the portfolio towards data trends that exhibit characteristics of higher expected return while focusing on minimizing costs.

Tax Planning & Preparation





Retirement brings a lot of complex choices such as planning for the timing of Social Security benefits, retiree-specific tax planning, making Medicare and other health insurance decisions, and combating longevity risk.

SCHEDULE A COMPLIMENTARY

CONSULTATION

Alison
WEALTH MANAGEMENT

As Seen In

Bankrate, Inc. **Bloomberg** **Forbes** *MarketWatch*

FINANCIAL ADVISOR **IQ** **Financial Planning** **USNews**

DAVE ALISON, CFP[®], EA
CERTIFIED FINANCIAL PLANNER™
Certified Financial Fiduciary®
Enrolled Agent

[f @AlisonWealth](#) [t @AlisonWealth](#)

Working with your **CERTIFIED FINANCIAL PLANNER™ & Enrolled Agent** at Alison Wealth Management can bring all your financial, tax, and investment management needs together so you don't have to worry -- ultimately helping ensure your retirement is on track and you live your best life.





Although many professionals may call themselves “financial planners,” CFP® professionals have completed extensive training and experience requirements and are held to rigorous ethical standards. They understand the complexities of the changing financial climate and know how to make recommendations in your best interest. CFP® professionals are required to act as a fiduciary of the client at all times when providing financial advice

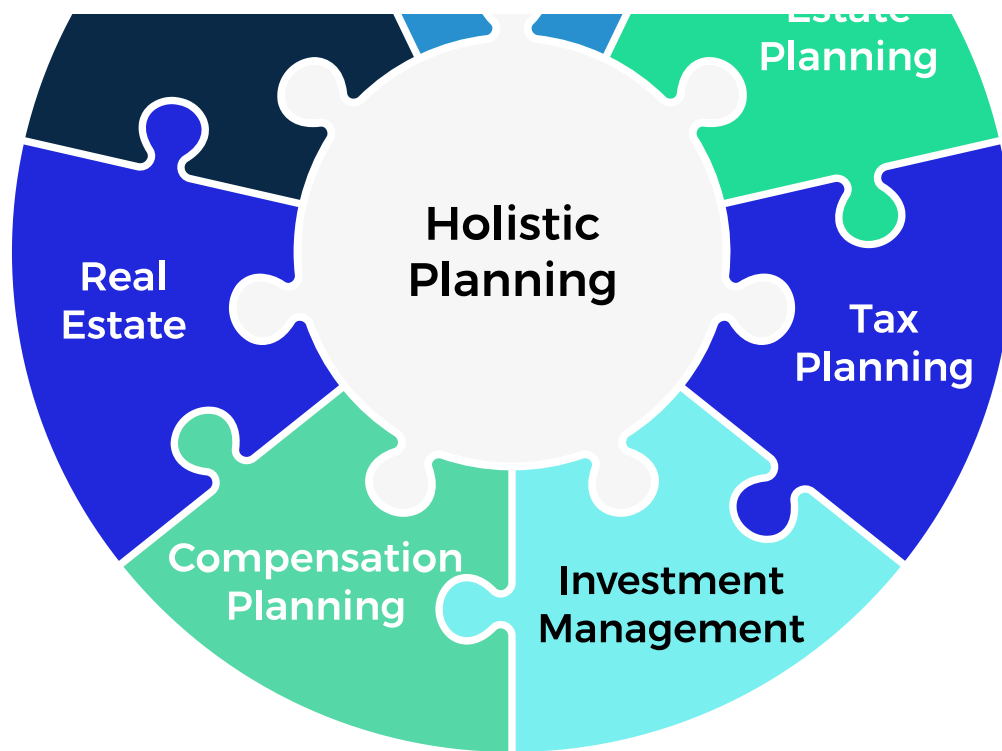
Enrolled Agents (EAs) are federally-licensed tax practitioners who may represent taxpayers before the IRS when it comes to collections, audits and appeals. Enrolled agent status is the highest credential the IRS awards. Individuals who obtain this elite status must adhere to ethical standards.

Our team takes a **holistic approach** to financial planning. We try to help maximize your life-savings to accomplish your unique goals by coordinating all critical areas of your financial life, including:

- Comprehensive Financial Planning
- Investment Management
- Tax Planning & Preparation
- Insurance
- Compensation Planning
- Estate Planning
- Social Security strategies
- Medicare

OUR EXPERTISE

[Click here](#) to learn more about Alison Wealth Management. For a complimentary consultation [contact us](#) or call now at (650) 617-3402.



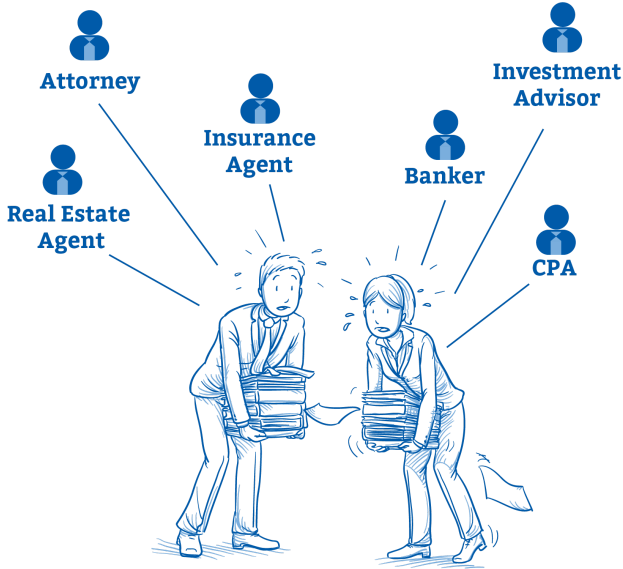
Delivering a complete, integrated experience.

At Alison Wealth Management, we bring the pieces together so you don't have to--helping you grow and protect your wealth.

OUR HOLISTIC APPROACH

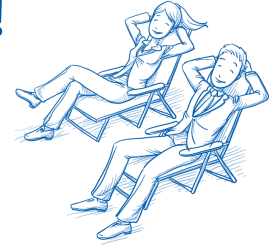


Why Do It Yourself...



When We Can Help!

We manage your professionals so you don't have to



We know the greatest commodity of all is your time.

Alison Wealth Management provides you a household CFO to coordinate all financial matters so you don't have to.

Ways to Work With Us





One-Time Individual Service

COST STRUCTURE

Get started

NAME

EMAIL

PHONE

MESSAGE



Let's Have a Discussion!

BOOK A PHONE APPOINTMENT

BOOK A CONSULTATION

Meetings can also be scheduled by calling [650-617-3402](tel:650-617-3402)

Explore our blogs



How can you profit in today's interest rate environment?

APRIL 28, 2019 • INVESTMENT

How can you profit in today's interest rate environment? At Alison Wealth Management, we offer our client's a private client cash managemen





and annuities offered by an insurance company.



Getting to the Point of a Point

MARCH 17, 2019 • INVESTMENT

A quick online search for “Dow rallies 500 points” yields a cascade of news stories with similar titles, as does a similar search for “Dow drops 500 points.” These types of headlines may make little sense to some investors, given that a “point” for the Dow and what it means to an individual’s portfolio may be unclear. Headlines vs. reality, check out more at our blog!



The Retirement Gamble

MARCH 8, 2019 • TAXES, RETIREMENT FUNDING, INVESTMENT

Most people wouldn't consider contributing to their employer sponsored retirement accounts as a gamble, but when you consider the tax attributes, a different story unfolds. As with most things in life, there are trade-offs to investing in retirement vehicles such as a 401k, 403b, TSP, or an IRA. The IRS allows a retirement plan participant to claim a deduction on their tax return today, in exchange for full taxation in the future.

[VIEW MORE](#)

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Certified Financial Planner Board of Standards, Inc. (CFP Board) was founded in 1985 as a 501(c)(3) non-profit organization that serves the public interest by promoting the value of professional, competent and ethical financial planning services, as represented by those who have attained CFP® certification. CFP Board sets and enforces the requirements for CFP® certification, including: education, examination, experience, and ethics, Individuals who successfully complete CFP Board's initial and ongoing certification requirements are authorized to use the CFP® certification marks in the United States.

The Certified Financial Fiduciary® certification a professional designation provided by the National Association of Certified Financial Fiduciaries (NACFF), Charlotte, NC. To receive this designation, the individual must complete a certification and training process created by NACFF and The American Financial Education Alliance. The individual must complete a 1-day training course and pass the Program Assessment. The program educates professional advisors about the laws, rules and regulations that determine when the individual is acting as a fiduciary. 10 Annual Continuing Education Hours must be completed to renew the certification. 1 keeps the individual up to date on the fiduciary rules.





FPA supports high standards of professional competence, ethical conduct and clear, complete disclosure when serving clients. FPA's One Connection™ for professional development, business success, advocacy and community at the national and chapter levels is truly indispensable in the advancement of today's CFP® professionals.

NACFF was created to provide all the information, tools, and resources needed for financial professionals to ensure they are compliant with the fiduciary standard.

National Ethics Association (NEA) is a membership based professional organization that has helped business professionals build their businesses on a foundation of trust, ethics and best practices. NEA is committed to helping businesses serve their customers with knowledge and integrity by providing educational resources and content encouraging and promoting ethics in business and beyond. NEA membership doesn't make business professionals ethical. Nor does it give them license to tout their membership as a badge of ethics.

The members believe in the importance of trust, transparency, and due diligence in creating a dynamic and successful business marketplace and they wish to affiliate with other business professionals who share those beliefs. For more information on NEA:

<https://www.ethics.net/>.

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