### AN INDEPENDENT

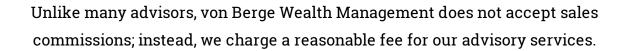
Financial Advisory Firm

## von Berge Wealth Management

on Berge Wealth Management is an Independent, Investment Advisory Firm located in San Diego, CA. We specialize in comprehensive wealth management and personal financial planning for individuals, families, small business owners, professionals, and retirees.

CLIENT LOGIN (HTTP://SCHWABALLIANCE.COM/)

MEET THE TEAM (/ABOUT/MEET-THE-TEAM.HTML)



READ MORE (/ABOUT/WHY-CHOOSE-US.HTML)

#### **Clients First**

As fiduciaries, we are required to act in each client's best interest, and place client interests first and foremost, always.

READ MORE (/RESOURCES/FAQ.HTML)

#### Comprehensive

It's more than just investing successfully- our goal is to understand the big picture.

READ MORE (/SERVICES/FINANCIAL-PLANNING.HTML)



#### **Financial Planning**

<u>more (/services/financial-planning.html)</u>

Financial planning is the roadmap to a secure and fulfilling life, according to YOUR definition. We consult, but most importantly, we listen.

#### **Investment Management**

<u>more (/services/investment-management.html)</u>

We believe long-term investing in an appropriately diversified portfolio is one of the proven ways to successfully grow wealth.

#### **Retirement Planning**

more (/services/financial-planning.html)

It is possible to know today, the amount of savings needed monthly to achieve the retirement of your desires, and to know if you are on track to achieve your goals.

## Who We Serve

We provide comprehensive financial solutions for entrepreneurs, investors, professionals and, retirees.

By working together, we gain a clear understanding of your challenges and opportunities.



**Individuals & Families** 

investors



#### **Businesses**

entrepreneurs



**Professionals** 

physicians



#### Retirees

pre & post

## **Get in Touch**

von Berge Wealth Management
600 W Broadway, Suite 2625, San Diego, CA 92101 | <u>Get route</u>
(<a href="https://www.google.com/maps/place/One+America+Plaza/@32.7162348,-117.1709384,17z/data=!4m8!1m2!2m1!1s600+W+Broadway,+Suite+2625,+San+Diego,+CA!3m4!1s0x0:0x75cc1806e65569a
6!8m2!3d32.7164928!4d-117.1686611)</a>

(619) 343-2913 | info@vonbergewealthmgt.com (mailto:info@vonbergewealthmgt.com)

complimentary 'get acquainted' meeting (/contact.html)

# Copyright © 2018 von Berge Wealth Management Securities offered through Charles Schwab & Co., Inc. Member <u>FINRA</u> (<a href="http://www.sipc.com/">http://www.sipc.com/</a>).

Advisory services offered through Laurel Wealth Advisors Inc. an SEC Registered Investment Adviser.

Registration does not imply a certain level of skill or training.

Powered by AdvisorFlex (http://www.advisorflex.com)

TOP