Dobbins Financial | Dobbins Wealth Management

(602) 279-5464

Have Your Finances and Investments All Under One Umbrella

Dobbins Wealth Management and Dobbins Financial are independently owned companies located in Phoenix, Arizona. Clients choose us for our unique approach to financial planning and wealth management.

Who We Are

Dobbins Financial and Dobbins Wealth Managemnet work as a team to offers unbiased recommendations and a level of individualized service that can be difficult to find from larger financial institutions. As an independent boutique firm, we are dedicated to helping clients with their tax, investments, retirement, and estate planning needs. We make it a point to reveal your life priorities, then customize a strategy to help you reach these goals.

Our Distinction | Our Focus | Our Team

Our Distinction

We Go Beyond

As a *Fiduciary Firm*, we believe that it is about you, not products or any pre-determined recommendations. Our unique approach to personalized tax and financial management is what sets Dobbins Financial and Dobbins Wealth Management apart. Having everything under, *"One Umbrella"*, has always been the approach, and it is what continues to please clients today.

Independent Ownership

Dobbins Wealth Management and Dobbins Financial are not commission based. We simply focus on the best wealth management opportunities and design a customized plan that is unique to you.

Highly Trained Team

With over 50 years of combined experience, the Dobbins teams serve as a powerful resource for you, your business and your family. We have highly trained professionals that are constantly seeking additional education and certifications.

2 in 1

Dobbins Financial is a locally owned company specializing in tax preparation, consulting and bookkeeping services. Working in conjunction with Dobbins Wealth Management, we offer clients a holistic approach to meeting their financial goals.

Objective Advice

As a *Fiduciary*, we are bound to act in your best interest and look at all aspects of your tax and financial situation. Our clients get to experience financial freedom and global diversity by providing a unique approach to wealth management and tax.

World-class Access

Our stature within the industry allows Dobbins Wealth Management and Dobbins Financial access to top institutional money managers and other services not available to the typical financial advisor.

Our Clients

Over the past 2 decades of being in business, we have been extremely blessed to have built outstanding relationships with our clients. Although most other firms have account minimums, we do not. We choose to work with a limited number of clients who appreciate a notable level of expertise and individualized service.

Our Focus

No one strategy fits everyone, which is why every client gets our undivided attention—from planning to execution to follow-up. We take a proactive approach to helping you develop a strategy to address your financial goals and objectives, using the most efficient methods available. We make it a priority to demonstrate a genuine commitment to the well-being of our clients and not merely the interests of the firm.

Our Team

The Dobbins Wealth and Dobbins Financial teams provide expert advice and exceptional service to each of our clients. We have proven experience delivering personalized services custom-tailored to meet your needs. We believe our commitment to listening and our capabilities to really hear what you are saying is key to your success.

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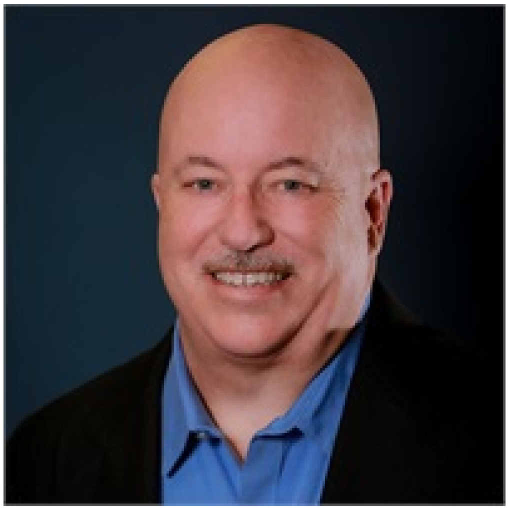

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Client Center

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American Equity Access

LOGIN

IRS-Where's My Refund?

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All Videos
All Calculators
All Presentations

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