True Wealth Management

Thomas W. McAuliffe

(415) 482-8622

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Welcome

True Wealth Management is a holistic wealth management firm located in San Rafael California, founded by Tom McAuliffe in 1994. In successful wealth management each part must be considered in relationship to the whole. We want to get to know who you are and to support you in creating a successful, happy life, so we ask a lot of questions:

- What's important about money to you?
- What are your dreams, your goals, your needs, and your resources?
- Where do you see yourself in 5 years, 10 years, or longer?
- How do your assets support you in reaching your goals?
- Are you serving your money, or is your money serving you?
- What keeps you up at night?
- How much is enough?

These are just a few of the questions we discuss with all of our clients. Once we've established a basis of working together we prepare a written financial plan to help guide our work together. Your assets are a strategic component to your living the life you deserve. We want to make sure you make smart choices about your money.

We offer access to some of the industry's most comprehensive benefit plans for business owners and executives, plus multi-generational wealth strategies, risk assessment and solutions, as well as portfolio management.

We are located in the lovely Gerstle Park neighborhood of San Rafael CA.

Our areas of expertise include:

- Key-man or Key-person insurance to protect your business and your interests
- The Vault: Employer Sponsored Health Plans
- Post Retirement Healthcare Trusts
- Retirement Income Planning
- Strategic Asset Management - offered through LPL Financial

- Portfolio review
- Estate Planning
- Wealth Transfer solutions
- Family business succession planning
- Philanthropic Planning

Who We Work With
True Wealth Management works with high-net-worth business owners and key executives who want to mitigate risk to their business partners and their family. We work with families who want to create multi-generational wealth and leave a legacy of philanthropy and family support.

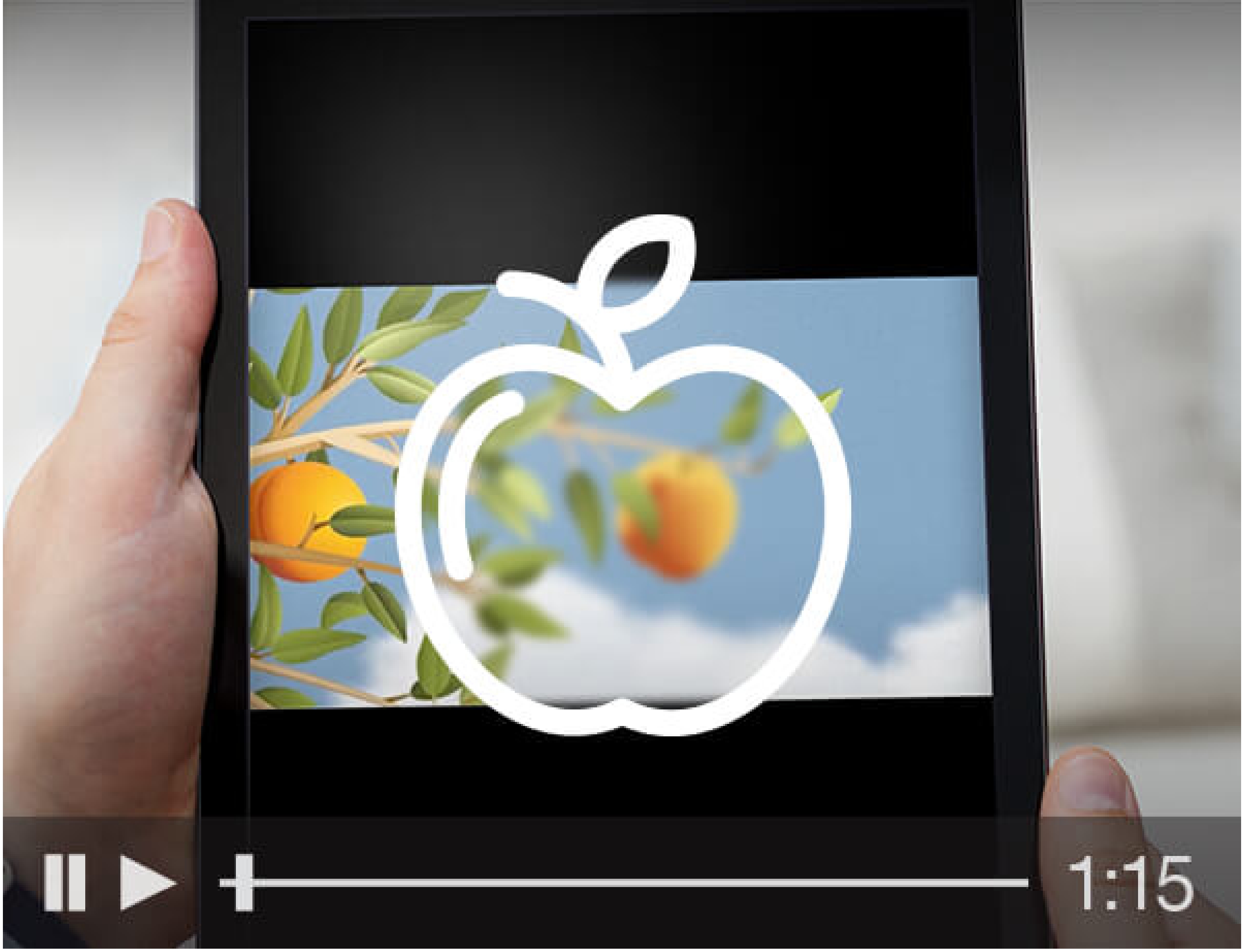
Helpful Content

Put It in a Letter

A letter of instruction provides additional and more personal information regarding your estate.

Is a SEP-IRA Right for Your Business?

For some, the idea of establishing a retirement strategy evokes worries about complicated reporting and administration.



A Fruitful Retirement: Social Security Benefit

Taking your Social Security benefits at the right time may help maximize your benefit.

Articles

Calculators

Presentations

Videos

Have A Question?

Name

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Question

SUBMIT

Weekly Market Commentary

Each week the LPL Financial Research Team assembles thoughtful insight on market and economic news.

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Download Economic Commentary

Contact

Office: (415) 482-8622
Fax: 415-276-1996
tom@true-wealth.net

Experience Matters

About Us

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True Wealth Management

Office: (415) 482-8622
Fax: 415-276-1996

45 Pleasant Lane
San Rafael, CA 94901

tom@true-wealth.net

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