



We are a Financial Life Management firm that provides clients with financial planning and investment advisory services.

Phone: 866-520-4985 (tel:866-520-4985) Email: [info@occamlc.net](mailto:info@occamlc.net) (mailto:info@occamlc.net)

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Featured in:

**The New York Times**

(<https://www.nytimes.com/2017/02/19/your-money/who-will-listen-to-a-billionaires-troubles.html>)



(<http://www.wsj.com/video/how-to-stop-fighting-over-money/821BE476-45C8-41BF-BA4C-F1D09998E79D.html>)

**Journal of  
Financial Planning**

(<https://www.onefpa.org/journal/Pages/How%20Clients%E2%80%99%20Money%20Scripts%20Predict%20>

Financial

(<http://www.financial-planning.com>)



(<http://www.usatoday.com/story/money/columnist/powell/2014/02/22/financial-adviser-retirement/5555275/>)



(<https://www.psychologytoday.com/experts/brad-klontz-psyd-cfp>)

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(<http://abcnews.go.com/Business/story?id=8159965>)

## OUR BELIEFS

It is our belief that the best way to take care of yourself, your family, and your favorite causes begins with a healthy relationship with money and a sound blueprint for financial success. What this means is that you and your family actively contribute to planning the financial life you want and we will help you to achieve it.

At OCCAM, we facilitate a client's financial transformation through the Your Mental Wealth™ Discovery Process. Think of this as the first stage toward building your blueprint for financial success. Throughout the process, you will gain a better awareness of your approach to financial decision-making, clarify your values and goals, and receive actionable guidance from your OCCAM Advisor.

## Your Mental Wealth® Discovery Process

How's My Financial Health?

Where Do I Want to Be?

## How's My Financial



When was the last time you had a [\(/\)](#) here you want to be, it's important to know where you are now. Financial health is more than the size of your portfolio. It includes things such as planning for the future, protecting your family, and comfort and confidence around past and present financial matters and self-care. The number one stressor in the lives of Americans is money. It's normal to have anxiety, frustration, confusion, and dissatisfaction surrounding one's investments and overall financial life.

Your OCCAM Advisor will work to uncover behavioral factors impacting your financial life. Our Clients come to us when they want change, and we help them to create for themselves. [Phone: 866-520-4985 \(tel:866-520-4985\)](tel:866-520-4985) [Email: info@occamlc.net \(mailto:info@occamlc.net\)](mailto:info@occamlc.net)

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[My Financial Health Continued \(/financial-health\)](#)

WHERE DO I WANT TO BE?

## Financial Life Planning

It is not uncommon for people to think of a financial plan designed around getting to and through their retirement. Unfortunately, between beginning ones working years and their retirement "LIFE" happens; marriage, home purchase, children, career changes, income increases and decreases, etc. As such, a financial plan should really be associated with a person's "Life Plan". While you can't plan your life, we can have some common assumptions and build a plan that is flexible for some of the changes life will bring.

As a Financial Life Management firm, we are life planners who strive to add value to the overall financial health and well-being of our Clients and their families by serving as the primary point of contact to ensure clients' financial decisions are well-integrated with their lifestyle decisions. This also helps us to keep our clients on track.

### Your Life Plan In Action

- A plan around your life, not just retirement or investments.
- Assumes your life will experience change and a need to pivot is likely.
- Your advisor is your navigator, but you are the driver.



Financial Beliefs

Unique Investor Behavior

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Values & Goals

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## Analyze



Review & Report Financial Status

Provide Gap Analysis

Provide Recommendations

[LEARN MORE \(/FINANCIAL-LIFE-PLANNING#ANALYZE\)](#)

## Take Action

Implement Financial Plan & Investment Recommendations

Ongoing Monitoring

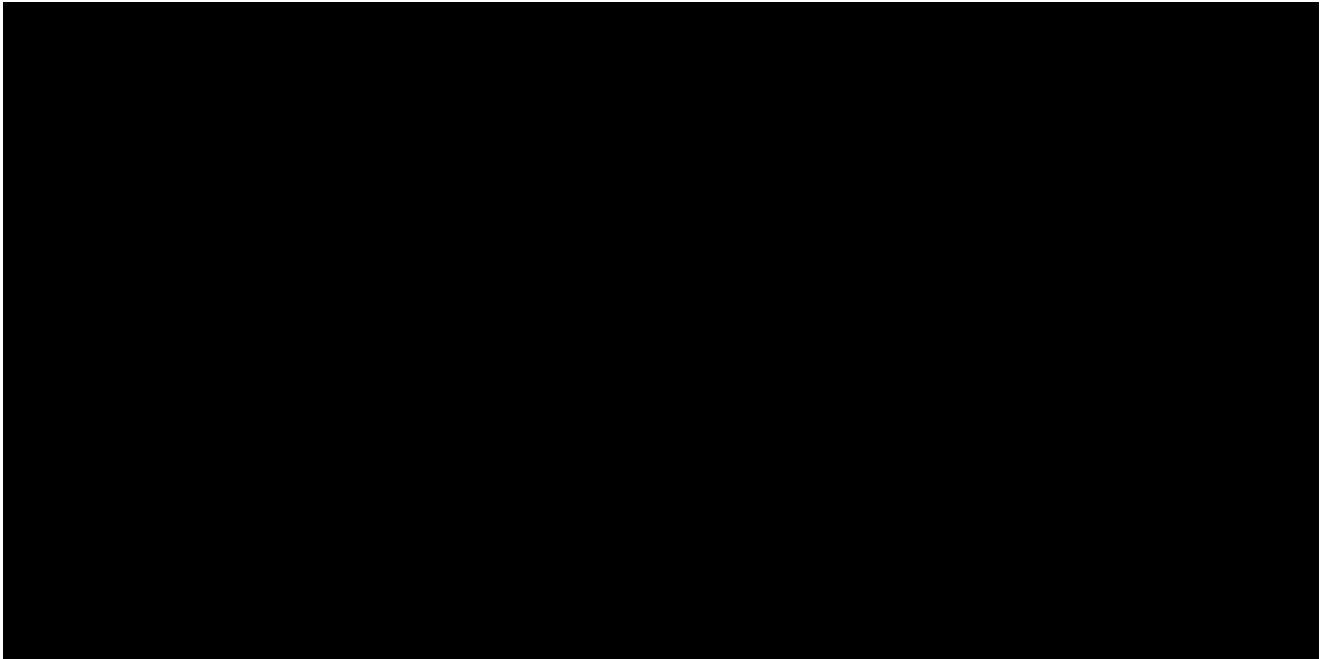
Ongoing Guidance, Communication

LEARN



#ACTION

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## OCCAM In The News

The New York Times (<https://www.nytimes.com/search?query=brad+klontz>)

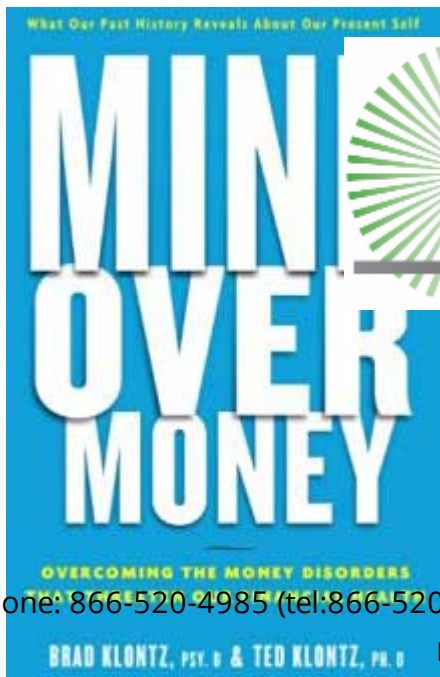
USA Today (<https://www.usatoday.com/search/klontz/>)

Kiplinger (<http://www.kiplinger.com/search/index.php?cx=partner-pub-7659493297315025%3A8959244375&cof=FORID%3A11&ie=UTF-8&q=klontz&sa.x=39&sa.y=16&si=1>)

Fox Business News (<https://www.foxbusiness.com/search?q=klontz&ss=fb>)

Financial Advisor IQ (<http://www.financialadvisoriq.com/search/search/advanced?q=klontz&x=2&y=9>)

Follow Dr. Brad Klontz on Twitter (<https://twitter.com/DrBradKlontz>)



## Mind Over Money

Dr. Klontz's Mind over Money will help you  
overcome your money disorders and live a  
richer and more prosperous financial life.

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(http://www.amazon.com/Mind-over-Money-Overcoming-Disorders-ebook/dp/B002WA4O9E/ref=tmm\_kin\_swatch\_0?\_encoding=UTF8&sr=&qid=)



(http://www.amazon.com/Wired-Wealth-Mindsets-Trapped-Potential/dp/0757307949/ref=sr\_1\_1?ie=UTF8&qid=1405968399&sr=8-1&keywords=wired+for+wealth)

## Wired for Wealth

Your Financial Comfort Zone: Do you need to break out?

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- 301 California Drive, Burlingame, California 94010 United States
- Phone: 866-520-4985
- Email: [info@occamllc.net](mailto:info@occamllc.net)

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