

[Home](#)

[Insights](#)

[About Us](#)

[Contact](#)

Financial Planning. Investment  
Management. Trusted Advice.

---

# Your professional partner in managing that unique set of circumstances you call, *Your Finances.*

## Planning

OUR PROCESS

---

PLAN EXECUTION

---

YOUR TOOLS

---

## Investments

ASSET ALLOCATION

---

DIMENSIONAL FUND ADVISORS

---

ALTERNATIVE INVESTMENTS

---

## Advice

ENTREPRENEURS & EXECUTIVES

---

YOUR RETIREMENT

---

MANAGING LIFE CHANGES

---

THE SWP DIFFERENCE

GALLERY



# The Value of Advice

## CLIENT PORTAL

Welcome,  
**Carl and Meredith Investor**

Accounts	<a href="#">+ Add Account</a>
Cash	\$100,000 <span>▼</span>
Credit Cards	-\$31,418 <span>▼</span>
Investments	\$2,795,293 <span>▼</span>
Life Insurance	\$20,000 <span>▼</span>
Loans	\$0 <span>▼</span>
Property	\$13,650,000 <span>▲</span>
Audi	\$50,000 <small>As of 1/08/2018 at 10:43am</small>
Beach House	\$650,000 <small>As of 1/08/2018 at 10:41am</small>
Burke Enterprises	\$10,000,000 <small>As of 1/08/2018 at 10:48am</small>

### Net Worth

**\$16,533,875**  
as of today

↑ \$152,804  
this month

↑ \$799,769  
year to date

### Investments

**\$2,473,691**<sup>1</sup>  
as of today

↓ \$2,036<sup>2</sup>  
Change

↓ -0.23%<sup>2</sup>  
Change

### Spending

[View All](#)

\$0 Income	-\$1,884 Expenses	-\$1,884 Net
---------------	----------------------	-----------------

Overall Budget \$0 of \$0

---

#### Recent Transactions

	Amounts
MAY 25 NORDSTROM SCOTTSDALE AZ	\$120.51
MAY 25 IN N OUT BURGER 146 SCOTTSDALE	-\$17.56
MAY .....	.....

## MARKET REVIEW




**QR**  
Quarterly Market Review  
Last Calendar Quarter

## GET STARTED

**get started**

## OUR TEAM



Making money is hard. That's why

The Phoenix Gazette's Money Matters and Money Makeover columns feature information **YOU ASKED FOR ADVICE** from local financial experts. It's useful advice in the Monday Business section of The Phoenix Gazette. The newspaper that makes an issue of responding to you.

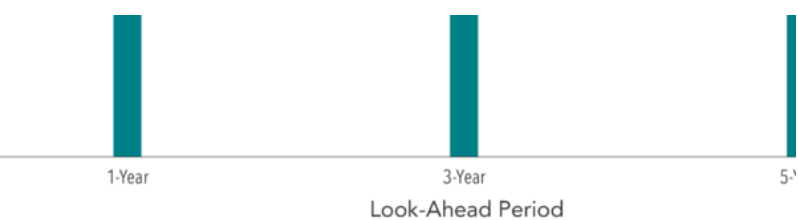
A Chief Financial Officer for the very personal business of *You*.

Scottsdale Wealth Planning is an experienced partner dedicated to guiding clients' unique financial lives and supporting them through information and technology.

[Get Started](#)

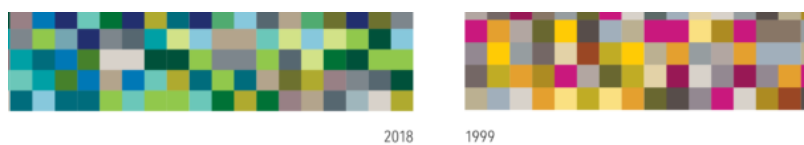
## Timing Isn't Everything

JULY 3, 2019



## The Randomness of Global Equity Returns

JUNE 3, 2019



## David Booth on Market Volatility

MAY 28, 2019



## The Uncommon Average

MAY 2, 2019



7033 E. Main Street, Suite 104

Scottsdale, AZ 85251

Phone: 480-550-8555

CONNECT

SCOTTSDALE WEALTH PLANNING

Financial Planning. Investment Management. Trusted Advice.

Copyright © 2019 · [Log in](#)