

WELCOME!

Financial Dynamics is Your Home for Comprehensive and Complete

Wealth Management for Lodi and the Northern Central Valley

Our philosophy is to provide our clients with both **personal** and **professional service**. We offer **Retirement Planning, Estate Planning,** and a full range of **Tax Deferral Plans** including **1031 Property Exchange** options.

Over the decades, we at **Financial Dynamics** have had the pleasure of working with many other professionals throughout Northern California and around our great nation. We've come to learn that our clients enjoy greater peace-of-mind when their advisors are working toward a common result, through **collaboration** and **tactical planning**.

Thank you for visiting our virtual office! We hope you'll make yourself at home, and please don't hesitate to contact us for a real, live meeting.

Our Process

Unlike the "pick-a-winner" approach of many brokers and traditional financial advisors, we believe our wealth management process is unique, personal and educational. It all begins with a complimentary, easy-going financial consultation, which you can arrange right now



by completing the short form below or you can [Click here to learn more about our process.](#)



Planning Services

Our full range of services includes:

- Retirement Planning**
- Pension & IRA Planning**
- Private Reserve Strategy**
- Mortgages**
- College Funding**
- ...and more.**

[Click to learn about our planning services.](#)



T.H.E.M.

In cooperation with our friends at Wealth Strategies Advisory Group, Financial Dynamics is proud to offer highly qualified investors a wealth management platform based on the same strategies used by the one of the nation's most prestigious and successful university endowments. .

[Click here to learn more about T.H.E.M.](#)

About Us

We're not a Wall Street firm. We're your neighbors, enjoying all that California's Central Valley has to offer, but we're also highly experienced. Financial Dynamics' founder, Richard Borba, dedicates over 4 decades of financial services expertise to



meet the unique needs of each of our clients.
[Click here to learn more about our leadership.](#)

Contact Us Today

** Indicates required field*

Name *

Phone Number *

Email *

How may we help you? *


SUBMIT

Or give us a call!

(209)625-8198



Financial
DYNAMICS



Guiding you on the way to your
financial destination



Financial
DYNAMICS

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Investment Advisory Services offered through Center Street Advisors, Inc. (CSA), an SEC Registered Investment Advisor. Securities offered through Center Street Securities, Inc. (CSS), a registered Broker-Dealer and member of [FINRA](#) and [SIPC](#), an independent Broker-Dealer. Financial Dynamics CSA and CSS are independent of each other. Please be advised that presently Richard Borba holds Series 1, 7, 63, 65 licenses in California. California Insurance License #0439375

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