



Client Access



Wealth is more than money, and
managing it starts with a plan.

The DeYoe Wealth Management team practices comprehensive, holistic financial planning and asset management. We create financial plans and portfolio strategies that are firmly-rooted in your personal values. You want to build a sustainable financial future for you, your family, and your chosen community. You may represent a family trying to build inter-generational wealth; a business-owner looking for continuity and

succession planning, or a non-profit foundation doing great work in the world. You have a complex financial life and we aim to simplify it. Our goal is to transform the lives of everyone we serve through mindful wealth management.

Where are you now?

We implement investment strategies that balance your current financial needs with your long term goals and tolerance for risk. When market volatility moves you out of your comfort zone, we help you remain focused on your financial path. When life offers you an unexpected detour, we evaluate your options with an eye towards today and tomorrow. At every turn, we are mindful of your values and unique personal journey, since we understand that the choices you make for yourself often bring the greatest joy.

Where do you want to be?

People and organizations are always evolving. We craft flexible financial plans designed to help you reach your long-term goals, sustain you when you get there, and

adapt when conditions on the ground change. If your destination shifts, we see that your portfolio and plan shift with you. If you lose sight of where you're going, we show you how you can get back on track. Because we believe that the single biggest determining factor of your financial success is your actions, we offer honest but compassionate guidance to help you stay the course you set for yourself.

How do you want to be remembered?

We would be honored to help you build your legacy, whether you want to establish a college fund for your grandchildren or a charitable foundation to improve the lives of people you will never know. Our team is personally committed to recycling wealth into our community and identifying ways our clients and their beneficiaries can use their money to achieve the greatest good on their terms.



DISCOVER

We love nothing more than helping people discover
and pursue their passions with all their hearts

PLAN

Making conscious trade-offs rather than on-the-fly decision yields HUGE happiness returns

INVEST

We manage money based on academic evidence. We asset-allocate, diversify, and rebalance. We manage for tax efficiency and we support better money behavior.



5 HOPES FOR THE NEW IPO BOOM MILLIONAIRES

The Bay Area is experiencing a boom of initial public offerings (IPOs) in 2019—and it looks like there’s no end in sight. With giants like Zoom Video, Uber, and Slack (among dozens of others) waiting to go public, it’s only a matter of time before a whole new crop of...



DO I HAVE A GOOD FINANCIAL ADVISOR?

What defines a “good” financial advisor? If you asked five different people, you’d get five different answers. But when you ask 19,000 people, some common trends start to appear. According to this survey, a good advisor is one who gives you a sense of security and...



2019 FORECAST: WHERE WE’VE BEEN, WHERE WE ARE, WHERE WE’RE HEADED

Part 1: 2019 DeYoe Wealth Management Forecast 1 of 4 - Where We've Been In his 2019 Forecasts Event (held January, 2019), Jonathan K. DeYoe discussed the global markets and economies and offers an explanation of where we have

been. He discusses the
unprecedented...

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Jonathan K. DeYoe is the president of DeYoe Wealth Management in Berkeley, CA and the author of **Mindful Money: Simple Practices for Reaching Your Financial Goals and Increasing Your Happiness Dividend**. The opinions voiced are for general information only and are not intended to provide specific advice or recommendations for any individual. We invite qualified

clients to meet with us to determine which financial choices and investments may be appropriate for them. Financial Planning and Investment Advice are offered only to clients who have signed an agreement with DeYoe Wealth Management, Inc., a registered investment advisor. All performance referenced anywhere on this website is historical and is no guarantee of future results. All indices are unmanaged and cannot be invested into directly. There is no assurance that the techniques and strategies discussed are suitable for all investors or will yield positive outcomes. Investing involves risks including possible loss of principal. **DWM ADVs | PRIVACY**