



Your Values. Your Goals. Our Process

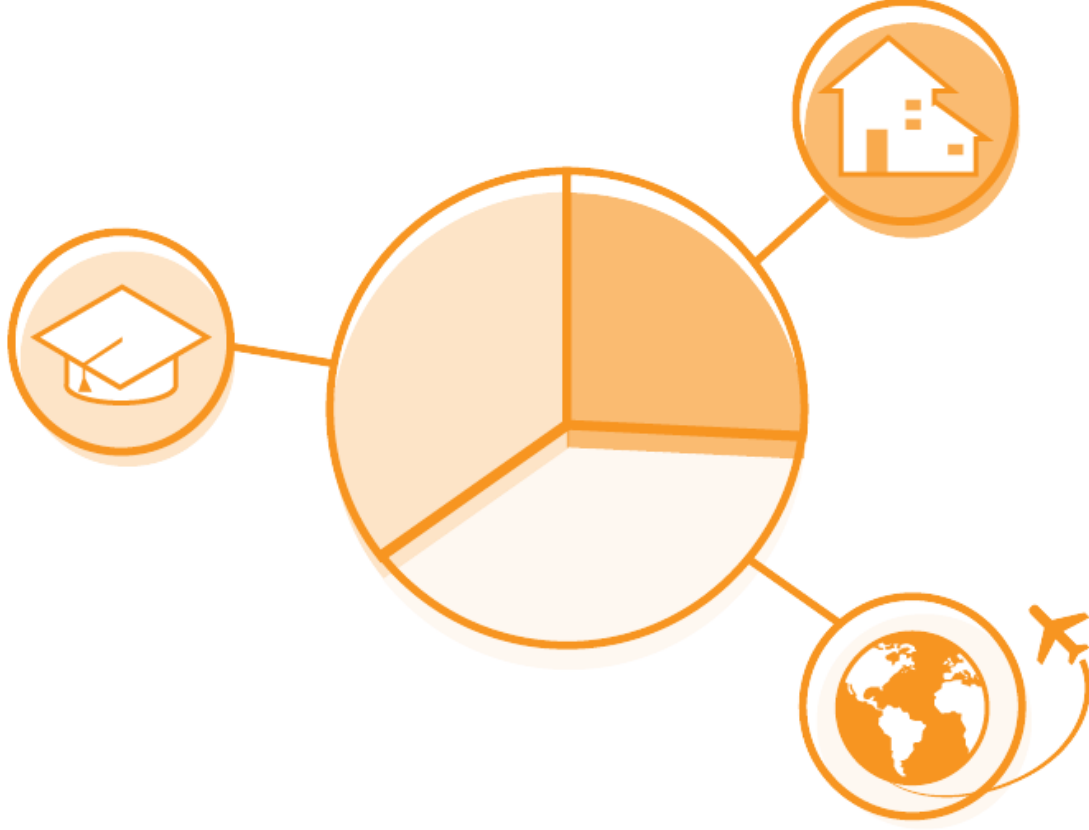
Live in the moment with the hope & joy that comes from a well-planned financial future. This is the Happiness Dividend.

Learn How It Works

Plan

Define your life goals and balance your return needs with your risk tolerance.

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Portfolio

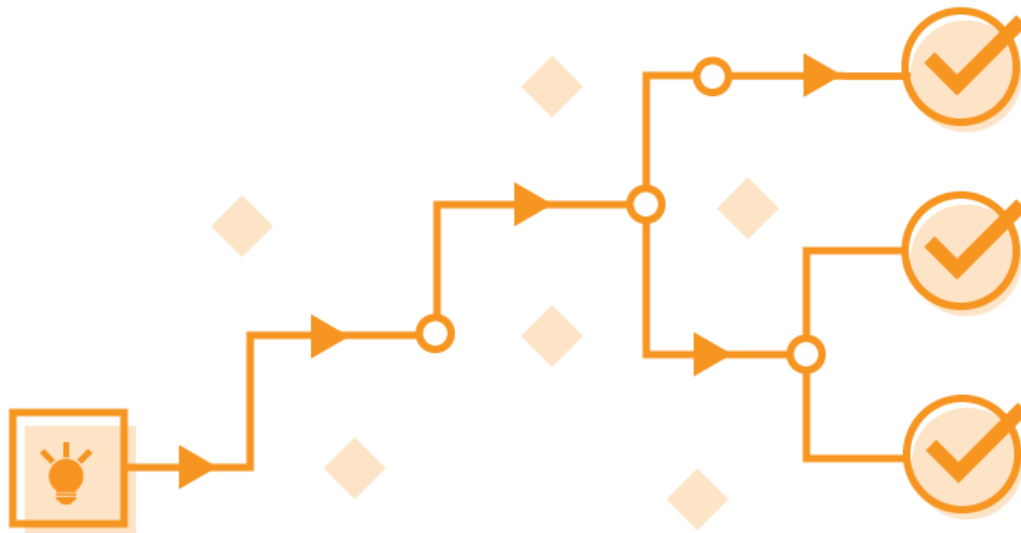
Target the investment outcomes you want while staying true to your investment philosophy and values.

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Our Process

We focus on asset allocation, diversification, and rebalancing

[Learn More](#)



Getting started is easy!

Why not consolidate your investments through our Digital Advisor?

[Get Started Now](#)

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Jonathan K. DeYoe is the president of DeYoe Wealth Management in Berkeley, CA, the author of Mindful Money: Simple Practices for Reaching Your Financial Goals and Increasing Your Happiness Dividend, and the founder of Happiness Dividend. Happiness Dividend is a blog offering educational content and tools. The opinions voiced are for general information only and are not intended to provide specific advice or recommendations for any individual. To determine which financial choices and which investment(s) may be appropriate for you, consult your financial advisor prior to investing. Financial Planning and Investment Advice are offered through DeYoe Wealth Management, Inc., a registered investment advisor doing business as Happiness Dividend. 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.

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