BAIR FINANCIAL PLANNING

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(619) 546-6160

Bair Financial Planning - Impact Investing For Sustainable Wealth

We are an independent San Diego wealth management firm founded over 28 years ago. We specialize in helping female CEOs, LGBT families, and successful business owners make important financial decisions that impact their future.

We believe that as a conscious business leader we can make a positive impact through environmental sustainability, social responsibility and corporate transparency. With this said, we have created our High Impact Portfolios to align our clients' money with their values. These portfolios integrate sustainability and ESG criteria in our investment selection process.

Our core values are centered around trust and open communication. We pride ourselves on the long-term trusted relationships we have with our clients and put them in the center of everything we do. We surround ourselves with diverse team members who understand that our only existence is to serve our clients.

Let us know if you would like to talk on how we can serve you,

Marci Bair, CFP®

President

LEARN MORE ABOUT OUR HIGH IMPACT PORTFOLIOS

Meet Our Team

Marci Bair, CFP®
President

My team & I look forward to meeting with you to discuss what’s important to you and how we can help.

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Bair Financial Planning Team

Our main goal is to service our clients and to exceed their expectations.

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Victor Orozco

My responsibility is to listen to you and help build a custom plan for you and your family.

LEARN MORE

Contact

Bair Financial Planning

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