Sweeney & Michel LLC
FINANCIAL PLANNING & INVESTMENT MANAGEMENT

Wealth Management Designed for *You*.

Sweeney & Michel, LLC is a financial planning and investment management team located in Chico, California. Our philosophy couldn't be any more simple: **Do what's best for the client.**

SCHEDULE AN APPOINTMENT

LEARN ABOUT OUR APPROACH

(530) 487-1777

2452 Lakewest Drive
Chico, California

Our Team

Our team's goal is to help every client organize and simplify their finances, so they can spend more time enjoying the life they've created.

We strive to make every contact with our current and potential clients a positive, informative and memorable experience. We work with clients in all stages of life and do not have an account or portfolio minimum.

LEARN ABOUT OUR LOW COST APPROACH

Brian Sweeney, IAR

Brian joined the financial advice profession in 1981 after graduating from Chico State. He later went on to teach graduate finance ...

MORE

Renée Michel, MBA

Renée is a founding partner of Sweeney & Michel, LLC and has been with the team since 2003. She graduated from the University of ...

MORE

Joe Sweeney, CFP®

Joe is a founding partner at Sweeney & Michel, LLC and has been with the team since 2010. He graduated from the Azusa Pacific University ...

MORE

VIEW ALL TEAM MEMBERS

OUR LOW COST APPROACH TO

Financial Planning

It's been proven that lower costs can help investors keep more of their savings. That's why our advisory services are 25% lower than the industry average. We believe this approach to investing can save you thousands over the life of your investments.* **Here's how.**

As Registered Investment Advisors, it's our fiduciary duty to always act in your best interest. Our recommendations are based only on your needs and our in-depth research; free from the bias of proprietary products and the conflict of investment commissions.

The real potential for savings is in our fee-based approach.

SEE HOW OUR APPROACH COULD RESULT IN LOWER COSTS FOR YOU.

WHAT TO EXPECT WHEN WORKING WITH US

Fidelity 2017 RIA Survey, Morningstar 2017 US Fund Fee Study.

WHAT TO EXPECT WHEN

Working With Us

1

Discovery

The goal of our first meeting is to determine if we can provide a valuable service for your financial needs.

During the initial meeting we will spend time learning about you and your financial concerns and expectations. Many times this first meeting is helpful for getting people organized financially.

We will discuss our investment philosophy and outline what a financial planning relationship between us looks like. There is never a charge for our initial meeting.

2

Financial Plan & Proposal

Our goal is to help you determine and formalize your financial goals within the context of your financial plan.

If we agree to work together, we will request statements of all relevant financial information. This might include account statements, social security projections, copies of trusts, insurance policies or more.

Our financial plan will incorporate all of this information as we show you where you stand today relative to your financial goals. It includes:

Personalized savings snapshot and family history • Net Worth Statement • Projected Income in Retirement • Budget Review • Estate Review • A short summary of recommendations to improve your financial outcomes

3

Onboarding

Once you are satisfied that the plan is appropriate, we will coordinate the account opening and transfer of assets.

4

Experience

Ongoing clients and advisor services include:

Managing the investment portfolio relative to your financial goals and objectives

Collaborating with your CPA and Attorney directly

Regular formal portfolio review and financial plan updates

We track and evaluate your financial progress over time

You have a direct line to your advisor team and can expect prompt replies to your calls and emails

Quarterly client educational events

Our fee only approach means there are no custodial or statement fees, deposit or withdrawal costs, commissions or third party asset manager program fees.

SCHEDULE AN APPOINTMENT

WHAT TO BRING TO OUR INITIAL MEETING

Let’s Talk.

Schedule an appointment today.

SCHEDULE AN APPOINTMENT

Or call (530) 487-1777

ABOUT US

- Our Team
- Our Approach
- What to Expect
- Contact Info

CLIENT SERVICES

- Fees & Services
- What to Bring
- Privacy Policy

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