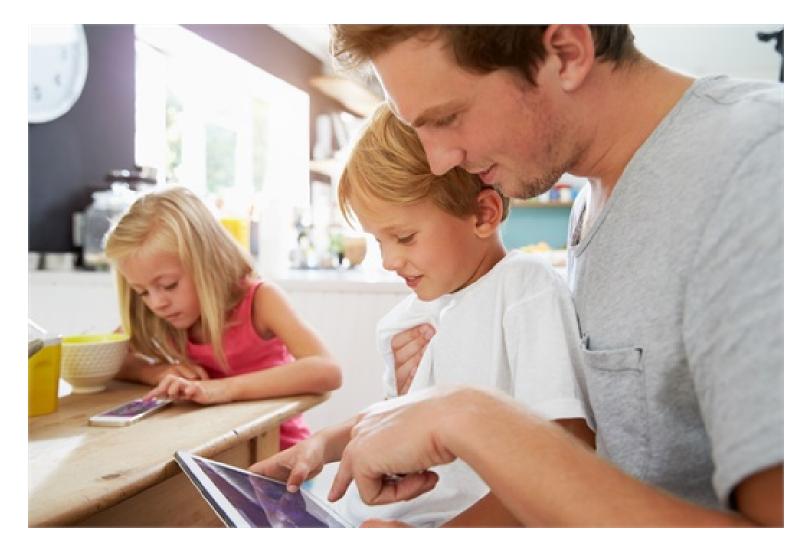


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**(**650) 753-8333



**Your Financial Future** 

Financial goals are as unique as we are as individuals, so why do so many financial services firms mass produce cookie-cutter financial plans? To have a successful strategy that targets your specific goals, you need holistic, personalized planning, from an advisor that genuinely listens to and stands by your needs. Red Tower Advisors has maintained this idea since day one.

Over 92% of our clients come to us by referral, and we are proud to say we've grown our business this way. It speaks to our clients' satisfaction with our services. By earning our clients' trust, we have the opportunity to serve their loved ones, families and friends as well. We'd love to show you the difference our client-centric approach will make in the ability to help make your financial dreams a reality.

# "An investment in knowledge pays the best interest." - Benjamin Franklin



### **Client - Centered Approach**

- Meaningful conversations where we listen to understand our clients' unique goals and aspirations
- A holistic strategy is created that forms a complete financial picture while providing directional guidance and structure for the future
- Clear recommendations that are designed to simplify the complex and help clients begin to take action, putting your best interest at the forefront of everything we do.

#### LEARN MORE



### **Personalized Guidance**

Our teamwork, experience, and diverse skill set allows us to innevente and provide meaningful perspective at any

- stage of life
  - An understandable investment approach that focuses on risk, cost- efficiency, and ensuring each client understands how their portfolio is tied to their goals
- A comprehensive view across multiple financial disciplines helps pull together all aspects of our clients' financial lives

#### **LEARN MORE**



# **Lasting Relationships**

- We are a dynamic team of seasoned advisors with 56 years of combined experience in the financial services industry
- A firm-wide commitment to go the extra mile and exceed our clients' expectations. Our interest in your lives creates clarity around priorities and builds trust
- Regular reviews, tailored and continuous advice keep clients informed of their progress and allows us to refine their plans as well as anticipate future needs

**LEARN MORE** 

**Meet Our Team** 



Brian Wong CFP $^{\mathbb{R}}$ ,CHFC $^{\mathbb{R}}$ , CLU $^{\mathbb{R}}$ , RICP $^{\mathbb{R}}$ , CDFA $^{\mathbb{R}}$ Principal Financial Advisor

**4** (650) 753-8333



brian@redtoweradvisors.com





Bryce Heringer
Director of Planning and Brokerage Operations

**(**650) 753-6673



bryce@redtoweradvisors.com



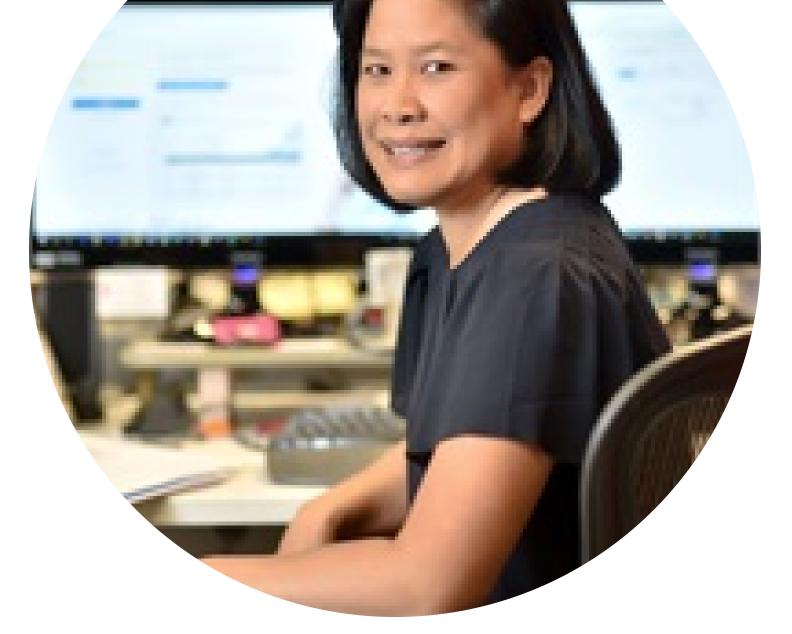
Melissa Wong Operations Manager

**(**650) 753-6672



melissa@redtoweradvisors.com





Kristine Hom

Senior Client Service Assistant

**(**650) 753-6674



kristine@redtoweradvisors.com

# Have a Question?

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#### **SEND**

#### **Contact**

**Red Tower Advisors** 

Office: (650) 753-8333

Fax: (650) 460-8338

1810 Gateway Drive

Suite 115

San Mateo, CA 94404

info@redtoweradvisors.com

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