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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.

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Personalized Guidance

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

- Our teamwork, experience, and diverse skill set allows us to innovate 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

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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

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Meet Our Team



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Have a Question?

Name

Email

Phone

Question

SEND

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