



**HAPPINESS**  
WEALTH MANAGEMENT

☎ (650) 413-9435

## **Your Financial Dreams: Empowered**

Helping you enjoy the financial future you always imagined.

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## Welcome to Happiness Wealth Management

With over 25 years of planning experience, we specialize in helping people build confidence in their future. Whether you are growing your nest egg, enjoying retirement, or preparing to sell your business, we can help you simplify and strengthen your financial world.

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# HAPPINESS WEALTH MANAGEMENT

## **What Does Financial Happiness Look Like To You?**

Happiness is a universal pursuit, but it's also a personal one. For some people, financial happiness is a life of adventure and travel. Some people's definition of financial happiness is taking comfort in the fact that whatever life throws at them they are prepared. For others, it's leaving a legacy through achievement and philanthropy.

When you partner with our team, we strive to truly understand your unique vision for the future.

Whatever you might hope to achieve, we dedicate our expertise, resources and time to help you complete your picture of financial happiness. While providing a comprehensive array of services, we craft sophisticated solutions tailored to meet your needs today, tomorrow and for years to come.

## **What We Do**



## Retirement

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# Investment

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## Estate Planning

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**Insurance**

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## **7 REASONS TO WORK WITH HAPPINESS WEALTH MANAGEMENT**

- 1) Great Communication. You decide how often you would like to be called to have your account reviewed.
- 2) A free, robust financial plan that changes as your life changes.
- 3) Competitive fees. We strive to keep your costs down.
- 4) This company was founded to be a blessing to others. 10% of all profits go to charity!
- 5) Access to many of the world's greatest financial products and strategies. You will receive independent, objective advice and personalized guidance with no proprietary products.
- 6) Excellent customer service that only a boutique firm can deliver.
- 7) Experience. Mike Duffy has been making high net-worth clients happy for over 26 years.



# Happiness Wealth Management's 6 Key Elements of Financial Planning



[www.happinesswealthmanagement.com](http://www.happinesswealthmanagement.com)

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## Have a Question

Name

Email

Phone

Question

**SEND**

### Contact

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Money

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