MERCER PARTNERS WEALTH MANAGEMENT

donald.faul@lpl.com

(925) 932-4700

Account Login

"Someone is sitting in the shade today because someone planted a tree a long time ago."

- Warren Buffett

Where do you want to go? We'll get there, together.

Our first priority is helping you take care of yourself and your family. We want to learn more about your personal situation, identify your dreams and goals, and understand your tolerance for risk. Long-term relationships that encourage open and honest communication have been the cornerstone of my foundation of success.

Our History

Years of experience have prepared us to guide you through your life transitions.

LEARN MORE

Six-Step Process

Mercer Partners Wealth Management uses a widely accepted Six-Step financial planning process: Discover, Evaluate, Analyze, Create, Implement, and Monitor.

LEARN MORE

Shared Values

Trust. Honesty. Integrity. We believe values matter, and we live by ours everyday.

Life Transitions

Transitions are a part of life. The help of a professional financial guide allows you to understand your options even during the most difficult of times.

LEARN MORE

Words of Wisdom

"An investment in knowledge pays the best interest."

Benjamin Franklin

Welcome to the family

Our team of professionals have years of experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you.

LEARN MORE

Our goals are your goals

Our team of professionals have years of experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you.

LEARN MORE

Meet Our Experienced Team

Don Faul, CFP®

Managing Director, CERTIFIED FINANCIAL PLANNER™

donald.faul@lpl.com

Jeremy Olen, CFA

Chief Investment Officer, Strategic Wealth Advisors Group

Karla McQuain

Client and Community Services

karla.mcquain@lpl.com

Joelle Craker

Client Operations

Marci Adams

Client Services

marci.adams@lpl.com

Chad Faul

Hao Dang

Vice President, Portfolio Consulting, Strategic Wealth Advisors Group

Where do you want your financial roadmap to take you?

Our first priority is helping you take care of yourself and your family. We want to learn more about your personal situation, identify your dreams and goals, and understand your tolerance for risk. Long-term relationships that encourage open and honest communication have been the cornerstone of my foundation of success.

Have a Question?

Name

Phone

Question

SUBMIT

Contact

Office: (925) 932-4700
Fax: (866) 531-7651
1243 Alpine Road
Suite 219
Walnut Creek, CA 94596
CA Insurance License #0627579
donald.faul@lpl.com

Quick Links

Retirement
Investment
Estate
Insurance
Tax
Money
Lifestyle
All Articles
All Videos
All Calculators

The content is developed from sources believed to be providing accurate information. The information in this material is not intended as tax or legal advice. Please consult legal or tax professionals for specific information regarding your individual situation. Some of this material was developed and produced by FMG Suite to provide information on a topic that may be of interest. FMG Suite is not affiliated with the named representative, broker - dealer, state - or SEC - registered investment advisory firm. The opinions expressed and material provided are for general information, and should not be considered a solicitation for the purchase or sale of any security.

The advisors of Mercer Partners Wealth Management are Registered Representatives with, and securities offered through LPL Financial. Member FINRA/SIPC. Investment advice offered through Strategic Wealth Advisors Group, a registered investment advisor. Strategic Wealth Advisors Group and Mercer Partners Wealth Management are separate entities from LPL Financial.

FINRA Series 7 held through LPL Financial and Series 66 held through LPL Financial and Strategic Wealth Advisors Group.

CA Insurance License #0627579. Qualified Long Term Care Insurance Agent.

The LPL Financial Registered Representatives associated with this site may only discuss and/or transact securities business with residents of the following states: AZ, CA, CO, ID, NV, OK, TX, VA and WA.

Mercer Partners Wealth Management
Proud Member of