



HAPPINESS
WEALTH MANAGEMENT

☎ (650) 413-9435

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Your Financial Dreams: Empowered

Helping you enjoy the financial future you always imagined.

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Welcome to Happiness Wealth Management

With over 28 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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6 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) Cutting edge, robust financial planning tools that changes as your life changes.
- 3) Competitive fees. We strive to keep your costs down.
- 4) 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.
- 5) Excellent customer service that only a boutique firm can deliver.
- 6) Experience. Mike Duffy has been making high net-worth clients happy for over 28 years.

Happiness Wealth Management's 6 Key Elements of Financial Planning



www.happinesswealthmanagement.com

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Have a Question

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Question

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