

ACHIEVE VISION OF

FINANCIAL PLANNING, LIFE & WEALTH MANAGEMENT

**MEET THE EAGLE WEST
FINANCIAL PLANNING TEAM**

Rick Watson - The Eagle West Philosophy

Mike Clarke - Achieving the Life You Want Through Financial Planning

REQUEST INITIAL CONSULTATION

Schedule a zero obligation consult
with the right advisor for your needs.

We will simply talk about your situation and
how we approach achieving your vision of success.

REQUEST CONSULTATION

CLIENT SPOTLIGHT

Lisa Trent - Eagle West client on helping her child beat leukemia.



Lisa Trent - Our family's victory over leukemia.

It is perhaps the worst thing a mother can hear, "Your daughter has leukemia." Listen to Lisa's inspiring story as she helps her 8 year old daughter, Monica, win a fight for her life. It's an important story of hope and survival for one who has fallen ill.

Miles Tashima - Eagle West client on how a surgeon handles his own cancer diagnosis.



Miles Tashima - What happens when a skilled surgeon finds that he has a serious medical issue of his

Miles Tashima, receiving a diagnosis of colon cancer was forced to undergo an abrupt change to life. Seeing financial challenges with courage and with the support from those who love him. There were even some r

Robin Miller - Eagle West client on how “Operation Smile” changed my life.



Robin Miller - How “Operation Smile” changed my life.

After 20 years as an anesthesiologist, Robin wanted to make a bigger contribution. She found it in far away places where children with facial deformities a normal life. Listen to her inspiring and heartbreaking story about Operation Smile.

Alfonso Barba - Eagle West client on getting into medical school.



Alfonso Barba - Listen to his compelling and challenging story of getting into medical school.

Listen to Dr. Alfonso Barbra speak about his compelling and unique story of getting into medical school. A few people who actually choose which medical students got accepted to the university. This behind-the-scenes look at who is considering a career in medicine.

THE EAGLE WEST ELEVATE PROCESS

Achieve Your Vision Of Success With Us

No matter what your vision of success is, we will help you to achieve it. Join us and enjoy the personal benefits of being with the Eagle West team.

[Click to learn more »](#)

OUR STORY

How We're Different

At Eagle West we have a commitment to our clients that goes far beyond simply financial planning and managing money. We get “involved” with them. That involvement extends to helping them create those things that bring a deep and personal satisfaction to their lives.

After all, what's the point of a secure financial future if it isn't rooted in happiness for yourself and for those you love? Our clients tend to be those who are committed to a deeper purpose than simply the acquisition of wealth.

We are proud to support them in their life purposes in every way possible. When you work with Eagle West you will have a company that is dedicated to your vision of success and compliments the driving principles by which you live your life.

Our Mission

Our founding principle is to provide our clients with the highest degree of financial planning knowledge, investment skills and personal compassion for their life and family that they simply cannot find anywhere else. Our success as a firm depends on our strict adherence to this mission in every interaction we have with our clients. We choose to be guided by their satisfaction.

Our Performance For You

For us, it's simple. Be professional and be organized. Phone calls get returned quickly. Questions are answered thoroughly. We can supply clients with agendas prior to meetings and send complete summary letters afterwards. We say the things that our clients might not want to hear but we know that they need to hear.

We bring the truth about your financial life; direct and unfiltered. We are there with you in determination with your struggles and your joys. While this personalized style of interaction

isn't a fit for everyone, at Eagle West we tend to work with investors who are as bold and demanding as we are.

Bottom line – we use our expertise in finance and wealth management to put your interests first so we can serve you the best.

RECENT UPDATES

What are the Advantages of Rolling the Money of My Retirement Plan into an IRA?

Contributing to an employer-sponsored retirement plan (401K or its cousin, 403B plans), has many advantages and can help you achieve[...]

Taxes Inspire Me

As a California resident, the final straw broke when the gas tax legislation was passed.

Few things are more painful[...]



Get The 3 Key Steps to Effective Portfolio Management

Beyond "Buy & Hold The Index" Investing

[Check the background of this investment professional on FINRA's BrokerCheck](#)

Advisory services offered through EWG Elevate, Inc. dba Eagle West Group.

This represents a partial list of clients. They have not been compensated and were not selected based on duration, performance, account size.

NAVIGATION

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