Start Your Financial Planning Today

Pacific Wealth Strategies Group, Inc. is a Santa Barbara-based independent wealth management & financial pl
Investment Advisor (RIA), serving high net-worth families, from our offices in Santa Barbara and Porterville. Our o
wealth management and financial planning strategies to our clients, with a focus on risk mitigation, tax efficiency
family legacy planning.

As financial planners, PWSG's Advisors are experienced, knowledgeable and specifically trained to guide clients a
economic lifecycles. We aim to help clients maximize efficiency, control, and safety in the management of their w
with the highest level of professionalism, due diligence, accessibility, and commitme

OUR SERVICES

CUSTOMIZED FINANCIAL PLANNING

Delivering truly comprehensive wealth management and financial planning is our passion.

LEARN MORE

UPHOLDING FIDUCIARY STANDARDS

As a Registered Investment Advisor (RIA), we are a fiduciary to our clients. We have a fundamental obligation to act in your best interests – this is our duty of loyalty and good faith.

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PLAN-BASED INVESTING

We provide a wide-range of diversified financial products for optimum investment management, with the least amount of risk required.

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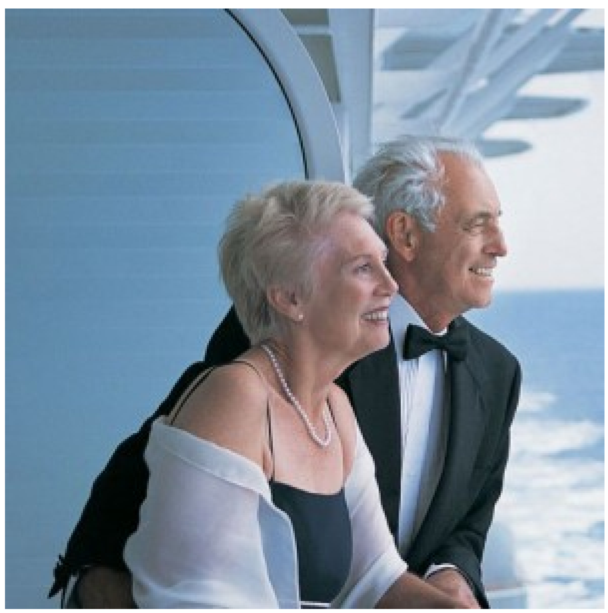

RETIREMENT PLAN DESIGN & ADMIN

We have been providing business owners with customized retirement planning for over a decade.

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DIVORCE PLANNING

We evaluate both the short- and long-term financial impacts of proposed divorce settlements.

LEARN MORE

POST-DIVORCE PLANNING

We have the tools and experience to help anyone navigate their post-divorce years with maximum safety, efficiency, and control.

LEARN MORE

PRO ATHLETE WEALTH MANAGEMENT

Using our TEAM-based system, we serve as Quarterback for the professional athlete's financial matters.

LEARN MORE

OUR TEAMS

Local Advisors Dedicated To Serving The Needs Of Our Clients And Our Community

elivering truly comprehensive wealth management is our passion and we take personal pride in helping our clients ach
In addition to our many years of wealth management experience, we are committed to serving the Santa Barbara and Po
professionally, donating our time and resources to various local organizations and non-p

MEET THE TEAMS CONTACT US

SANTA BARBARA

PORTERVILLE

LIFE IN A BOX

Cutting-edge financial software that puts your entire financial life into one easy-to-use cloud

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Have a question or need consultation?
We are here to help!

EMAIL US NOW