

Our CEO

SaaS & Enterprise, Finance and Payments, “Intelligent Software”, Consumer Palo Alto

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The Wealth Plan Difference

Coordinating business planning with personal planning.

Complete Financial Strategy

Multi-disciplined team uniquely designed to custom fit your needs.

Result Driven Experts

Forward thinking strategies from a dedicated team of financial experts.

Personalized Process

No need to tell your story independently to the CPA and then again to the attorney.

Our Story

Over 100 years of service you can trust.

Wealth Planning and Design was formed by three industry veterans with a combined 100 years of service and a desire to serve their clients. Through the years they developed long successful relationships and service across generations. Taxes, estate planning, risk, and investment management often require consumers to meet with multiple professionals. Wealth Planning and Design simplifies the process by coordinating taxes, estate planning, risk and investment management in a custom developed personalized process.

Many of the financial lessons that the average American uses today are based on “what you have been told to think” not “how to think”. This philosophy has created a dilemma and a crisis for the average American family. Being told “what to think” involves you transferring your wealth away to those who – create the situations – control the outcomes– and profit from you.

Traditional financial thinking is not a science. If it were, no one would ever lose money. It is far more important for you to learn how money works in your life. Unfortunately, much of the marketing done by financial institutions is done to increase their profits - not to teach you how money can work in your life. Much of the information that is being marketed is misguided and misunderstood and many times lacks common sense. For you to live the best life you can today, it will be important to understand how financial companies create the situation, control the outcomes and profit from it. With more information and more knowledge you will be able to make better life decisions.

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Our Unique Process

Simple yet intricate family management and planning

Our process is simple yet intricate. We have helped many families who are business owners or executives, still working and retired, by crafting a written plan that puts all life's pieces together. Information is gathered from our clients and evaluated. The combination of financial strategies is what makes our planning successful. Income tax planning can be impacted by investment planning. Risk management planning can be impacted by business entities. Our clients no longer need to make six appointments and attempt to self-coordinate their plan. We do it for them. Our clients have peace of mind knowing that all financial elements of their life are coordinated with their specific goals.

Financial planning is not simply investment portfolio management. Life can get complicated and when it does we often set the complicated issues to the side and keep life moving. We know we need to get our financial house in order but we have been down this road a few times and the results are pretty much the same each time. We are always interested in saving taxes, [Schwab on Finance](#) to be taken care of and we don't want to lose what we have worked so hard to make.

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Your Goals Are Our Goals

Simple yet intricate process for many families

College

How do you balance saving for a child's education with other current and future goals?

Business Owners

Making small adjustments to your plan today may have a substantial impact on tomorrow.

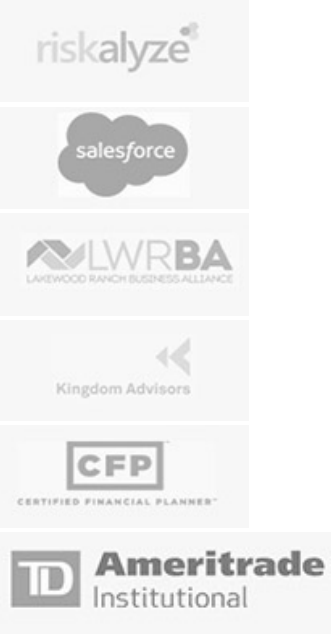
Retiree

Retire on your terms.

Expert Perspectives

Learn from our experts with insightful perspectives and advice. We can’t make any promises or commitments but if you are one of those who wonder if you CAN keep more wouldn’t you like to know if you could? Planning should be forward looking not a historical account. You don’t pack for a vacation after you arrive yet that is often what we do when it comes to tax planning.

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Our Why

We help you live a life that matters and reach your financial potential.

Life is about family and very few things in life are as important as family. Life’s journey can be complicated with many moving parts. Marriage, children, career, business ownership, home ownership, college expenses, weddings and even funerals are all part of this complicated life. You want the best, physically, financially, emotionally and spiritually possible for your family. We help families by guiding them financially through life’s journey with a specific plan that is as unique as their family. It is difficult to get the right solution when you’re starting out with the wrong premise. If you center your future around a false belief system, your life will be the result of what you believe. Financially, we assume things to be true that may not.

In order to make solid financial and life decisions you must learn to recognize the difference between opinion and fact. You must learn to think a layer deeper. Every one of your financial decisions creates an opportunity, either for you or others. Thinking a layer deeper in your new thought process will create a defining moment in your financial future. After all, what you know today will determine where you will be five to ten years from now.

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