

Our Clients Trust

We provide objective advice. We believe that earning a client's trust involves both a high standard of conduct and a high level of competence. We built this firm in part to demystify and filter the deluge of "news" and information served up to promote advertisers or pad the pockets of a media channel. Our clients benefit from our portfolio design and management skills that reflect expertise and experience, independence and honesty.

Investment success arises from the intelligent coordination of three disparate fields.



We deliver:

Insight

We recognize that clients prefer to make decisions based on solid information rather than on investment predictions and stories that elicit fear or greed. Our prudent decision making process evidences care, skill and caution.

Process

A good decision making process significantly improves the odds of a successful outcome. We explore a variety of solution paths with investors in order to enhance the likelihood of financial success.

Education

Based on your level of interest, we provide the resources for you to learn about the factors that can contribute to the successful management of your wealth.

Advice

We continually update our recommendations in light of changes in your circumstances and in the options the financial markets offer.

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Schultz Collins, Inc., is an SEC-registered investment advisory firm in San Francisco, with offices in Washington, DC and Towson, MD. People come to us looking for help with everything from simple IRA rollovers to retirement planning to large diversified portfolios. But the maze of investment advisors, money management experts, analysts, investment or wealth management services, investment managers, wealth management companies, asset management firms and trust companies is complex and bewildering. We cut through the confusion for clients in the San Francisco Bay Area – Marin, the East Bay, San Francisco, Peninsula, Silicon Valley – and all over the US. As independent investment counsel, Schultz Collins provides expert investment advisory services to individuals, companies and institutional investors. Our clients are attorneys, entrepreneurs, businesses, non-profits, trusts and endowments who want a simple solution for a complex problem: the prudent supervision of financial assets.

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