Lighthouse Financial Services, Inc.

CREATING A LEGACY

FOR GENERATIONS AHEAD

LEARN MORE (/WHO-WE-ARE)

Lighthouse Financial is an independent, fee-only advisory firm serving clients in Orange County and across the nation. Lighthouse Financial specializes in providing comprehensive financial planning for a broad range of investment and wealth management needs. We are fiduciary advisors, which means we always put our client's interest and needs first and do not receive back-end benefits for any product or service that we recommend.

(/financial-strategies)

FINANCIAL PLANNING

(/investment-management)

PORTFOLIO MANAGEMENT

(/tax-strategies)

TAX SERVICES

We understand everyone has different needs and values, which is why we take a holistic approach in carefully designing a unique financial plan for our clients.

LEARN MORE (/FINANCIAL-STRATEGIES)

Our actively managed investment strategies are designed specifically for each client’s distinct objectives and risk tolerance. We are focused on creating personalized investment solutions for every portfolio we manage.

LEARN MORE (/INVESTMENT-MANAGEMENT)

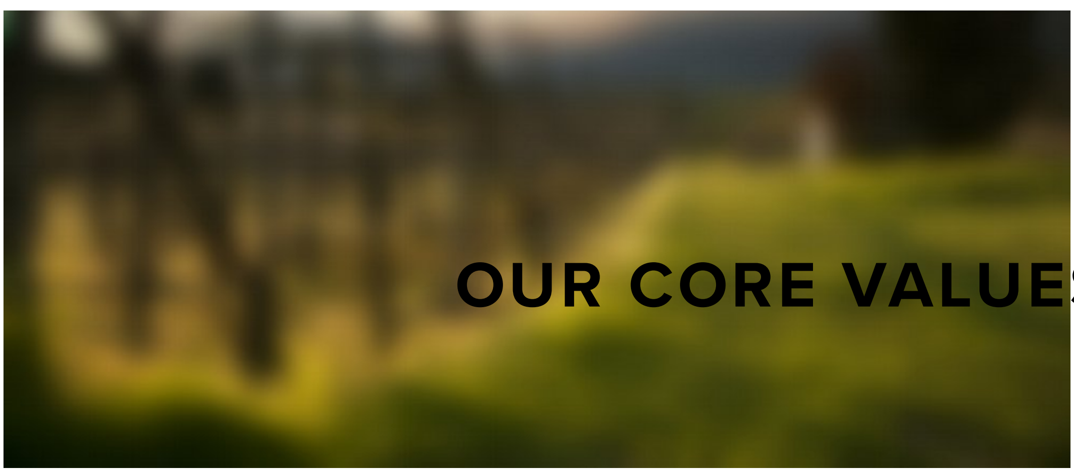
Tax planning is available for all actively managed clients. We fully believe in our services and are dedicated to providing each client expert advice.

LEARN MORE (/TAX-STRATEGIES)

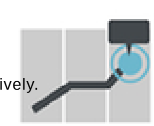
LIGHTHOUSE FINANCIAL SERVICES, INC. WAS ESTABLISHED IN 1992 WHEN "FEE-ONLY" ADVISORY FIRMS WERE IN THEIR BEGINNING STAGES

Our founder, George McDaniel, recognized early in his career that investment management and wealth management are equally important to high net worth investors. In fact, for most high net worth clients, they are integrally connected and should be analyzed with the understanding that the long-term success of any sophisticated investor depends on how well they manage both.

When considering the long reaching impacts of your financial well-being to your family and loved ones, we understand that no one product or service can empower you to success without a clear understanding of what it is that you want to achieve. The advisors and employees of LFS have built a successful company based on the belief that the way to achieve your investment goals is to work with you individually. Our financial success is directly connected to the long-term relationships that we develop with our clients and the quality of our advice. Operating as a "fee-only" advisory firm allows us to put your interests above our own. As a Lighthouse client, it's our goal to keep you in the driver's seat to your own financial success.



OUR CORE VALUES



ACCOUNTABILITY

Our clients trust us to help safeguard their future, and in return we believe they deserve clear communication and unflagging responsiveness.

OBJECTIVITY

Unlike profit-driven Wall Street firms, Lighthouse is an independent, fiduciary, fee-only firm. Our model allows us pure objectivity.

FLEXIBILITY

We individualize investment portfolios for each client, and personally manage them using an active, flexible approach that aims to protect your capital and grow it responsibly.

IN THE NEWS

LIGHTHOUSE Financial Services prides itself on the market news and insight it publishes.

NEWS AND INSIGHT (/NEWS)

RECOGNIZED BY

Forbes

OrangeCoast MAGAZINE

Newsweek

2019 FIVE STAR WEALTH MANAGER George D. McDaniel CEO 2012•2013•2015•2016•2018•2019

WSJ

George McDaniel has been awarded the **FIVE STAR** Professional award for a sixth year.

2019 Orange County Five Star Wealth Manager Ge...

Lighthouse Financial has been recognized as one of the top Wealth Management Firms in Orange County by ***Orange Coast Magazine*** and is featured in ***Forbes*, *Wall Street Journal*** and ***Newsweek*.**

Recognized by **Financial Advisor Magazine** as "Top 50 Fastest Growing RIA Firms" in 2014.

MEMBERSHIPS & DESIGNATIONS

(https://www.napfa.org/firm/24237919.16)

(http://www.plannersearch.org/financial-advisor/george-d-mcdaniel)

(https://www.letsmakeaplan.org/choose-a-cfp-professional/find-a-cfp-professional/Details/?key=038dbdbc-b859-4615-a0f1-bb2e8d3836a5&SimpleSearch=True&CityStateZip=92821&City=&Zip=92821&Radius=5&Latitude=3

(https://www.irs.gov/tax-professionals/enrolled-agents/enrolled-agent-information)

FEE ONLY NETWORK MEMBER
(https://www.feeonlynetwork.com/financial-advisor/dustin-burns/)

(https: (https: (https:

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LIGHTHOUSE

LIGHTHOUSE Financial Services, Inc. was established in 1992 when "fee-only" advisory firms were in their beginning stages.

OUR SERVICES

Financial Planning (https://lighthouselink.com/financial-strategies)

Investment Management (/investment-management)

Tax Strategies (/tax-strategies)

NEWS

MARKET ENLIGHTENMENT (/NEWS)

Market Updates

Search

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