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Schedule a complimentary consultation  
Call us today at 619.554.1300

Learn where Dan Gensler's personal passion for Wealth Management began...

[LEARN MORE](#)

## Meet Dan Gensler

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Learn how we can help you live the life you've always wanted. ►

## Portfolio Stress Test

What keeps you up at night?

Retirement:

Will my money last throughout retirement?  
Do I need long term care insurance?

Education Planning:

How much should I save?  
What are my college saving options?

Life Events:

What happens to my 401K when I change jobs?

What options do I have if I am laid off?

Estate Planning:

Will my family be secure?

Can I provide for a charity when I am gone?

[TAKE THE TEST](#)

## Our Award-Winning Team



Our award winning team has decades of experience in the Financial Services industry and will strive to provide you with excellent service from the moment you walk in our door.

[MEET OUR TEAM](#)



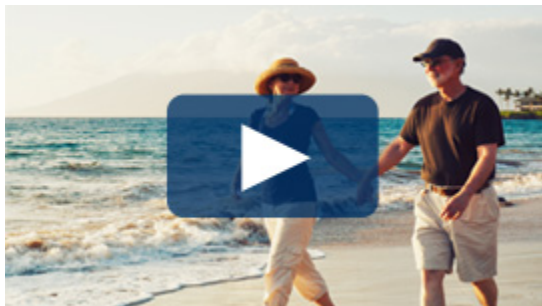
## Wealth Management System



Our Wealth Management System doesn't just track your finances; it also tracks your life. Everything you need is just a mouse click away. View this brief video and get started on the pathway to the retirement you've always wanted.

[LOG IN TO MY ACCOUNT](#)

## Watch Our Video



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## Subscribe to Our E-Newsletter

We use our e-newsletter to keep our clients updated on the latest wealth management tips and upcoming events.

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