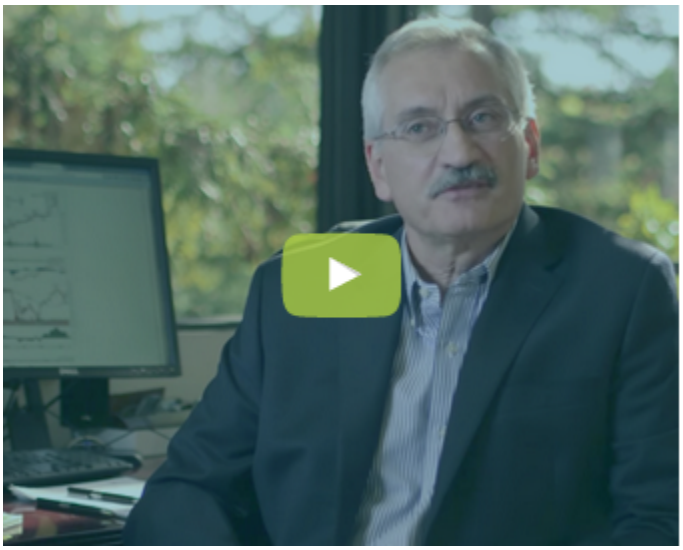
PRING TURNER
Investment Management

We help put your money safely to work so you can enjoy a better life.

As one of the most experienced financial advisory firms located in Walnut Creek (over 40-years in business), we provide highly personalized financial advice to you and your family. We work with you to develop a financial plan, plan for your retirement, build your diversified portfolio and continually

monitor your investments. Our goal is to help put your money safely to work so you can enjoy a better life. Meet the Financial Advisor Team.



Your Path to Financial Security

STEP ONE

Discover

Tell us your story of where you have been, where you are today and where you want to be.

STEP TWO

Plan

Design a personalized plan around your needs and goals.

STEP THREE

Guide

We strive to execute the plan to protect and grow your valuable assets while navigating the risks and rewards of the markets.

STEP FOUR

Secure

Sit back, relax and take comfort knowing we will

Financial Services

Investment Management

Our investment management service builds many layers of protection into your diversified investment portfolio. We are dedicated to generating the best risk-adjusted returns possible for you. Our "All-Season" approach emphasizes high quality, strong value, and income producing investments and is designed to adapt to the ever-changing economy and financial markets. We strive to make sure you participate in market gains while reducing your downside risk, so you can enjoy a safe financial journey with peace of mind. Learn more about Investment Management.

Financial Planning

We help craft a financial plan that fits your future and offer honest, effective, and creative financial advising that will guide you through accumulating, preserving and enjoying your family wealth. Tax efficient investing, charitable giving, contingency planning, retirement forecasting and legacy preparation are tailored to your specific circumstances. Our job

is to help streamline and organize your financial plan so you can spend your precious time on what is most important to you. Learn more about Financial Advising.

Retirement Planning

With our experience and well-designed process, we are your partner in preparing for and enjoying a secure retirement. Our retirement forecasting tools help determine how much you can afford to support your lifestyle after you retire and the best strategy to help you get there. We can help you organize and plan for your retirement so you will be confident you will have everything prepared for when you need it most. Learn more about Retirement Planning.

Sub-Advising for Financial Advisors

If you are a financial advisor or financial planner looking for an experienced partner with a proven track record to help manage your clients investment portfolios, our sub-advising service could be the solution for you. With this service, you partner with us as we manage diversified investment portfolios for your clients based on a unique business cycle strategy. As sub-advisors with a strong emphasis on risk management we take over the day to day investment decision making process while you remain focused on growing your business and servicing your clients' needs. Learn more about Sub-Advising for Financial Advisors.

Start Your Plan

Benefits of Working with Pring Turner

Proven Investment Track Record

Over several decades our disciplined investment process has delivered steady growth (returns) while taking roughly half the market risk (volatility) . Our goal is to generate as high a return as possible, without subjecting your wealth to significant loss. View our performance

Access to Expert Financial Advisors

You can draw on the firm's 40+ years worth of insights and knowledge from successfully managing client investment portfolios in constantly changing markets. Our financial advisors are regularly invited to speak all over the world to investment professionals and are ready to walk you through any financial questions you may have. Our Financial Advisors

We Wrote the Book (Literally) on How to Protect During Market Downturns

Protection is the top priority of our investment strategy. This safety-first approach is focused on protecting your money during market downturns, to ensure you have the capital needed can take full advantage of the ensuing bull market. Get the Book

We Take Your Security Seriously

Your financial security is a critical benefit of our offering. We provide multiple layers of protection against cyber criminals, fraudsters, and risky financial markets. Gain comfort and peace of mind knowing your money is safe and secure.

Straightforward Pricing – No Fine Print, No Surprises

Our straightforward incentive based pricing completely depends on the value of your account. The total fee you pay rises when your account increases in value and falls when your account decreases. We do not receive compensation from commissions and strive to keep transaction costs low. Our interests are 100% aligned with yours, this means we look out for your best interests, at all times, above all else.

Streamline & Organize Your Financial Life

By partnering with us we can help streamline and organize your financial life and save you precious time, so you can focus on what is most important to you. Spend less time analyzing, researching, and stressing about day to day financial decisions. You can't buy time, but you can certainly use it more effectively and pursue your life's interests and passions.

Why People Hire Pring Turner

We specialize in working with people in financial situations similar to yours and can help you through your major life stages.

Life Planning

Legacy Planning

Inheritance (Suddenly Wealthy)

New Business or Business Sale

New Job or Promotion

Whether you are preparing for retirement, managing a major life transition or thinking about investing for the first time our financial advisors are here to support you.

Who We Work With

We serve a diverse range of people, all with one common over-riding goal, to protect and grow wealth safely. We serve individuals, families, and financial advisors from all across the United States including:

People Nearing Retirement

Retirees

Business Owners

Growing Families

Technology Professionals

Financial Advisors

Business Professionals

Attorneys

Doctors

Case Studies

*Case studies presented are hypothetical scenarios and for illustrative purposes only.

Bob and Linda

In Retirement

Mary

Business Owner

Matthew
Financial Advisor

Don & Emily
Preparing for Retirement

Will and Kate
Growing Family

Lauren

Young Professional

Featured In

WSJ WALL STREET JOURNAL.

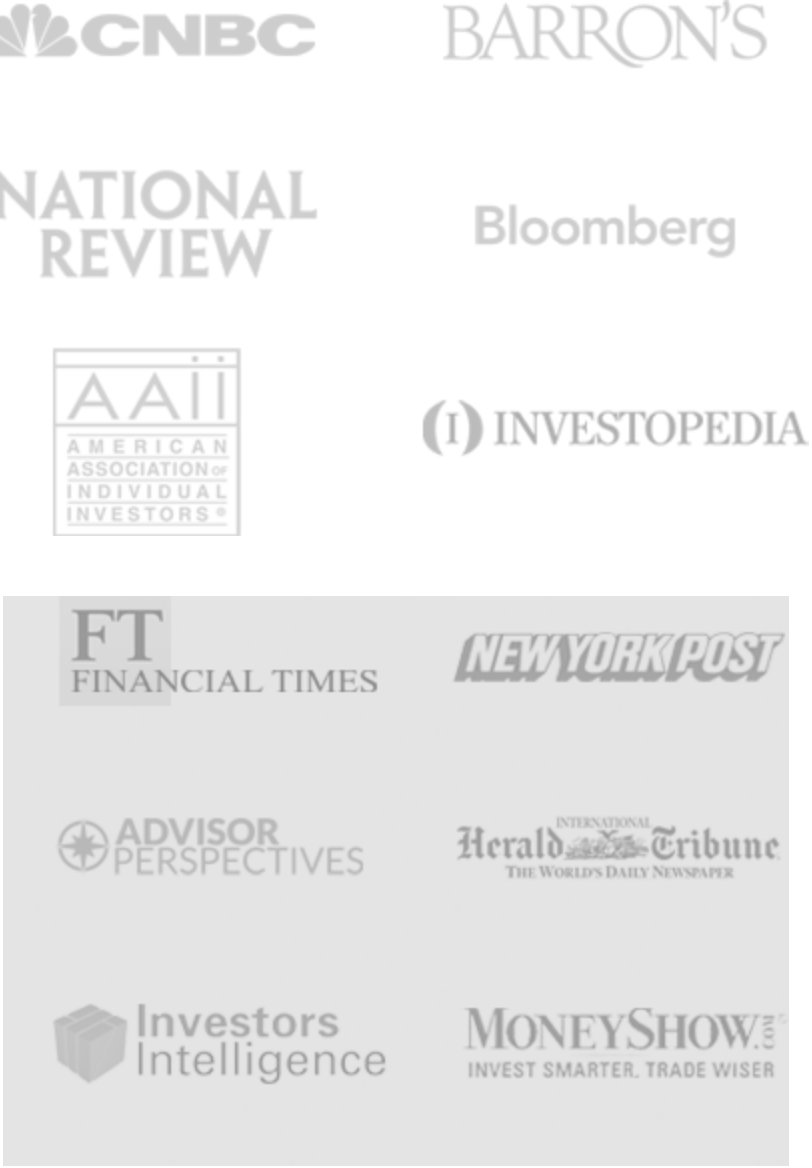
Forbes

Los Angeles Times

Seeking Alpha α

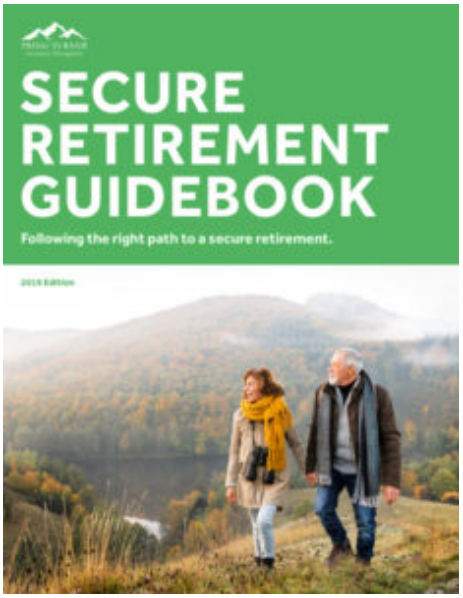
MarketWatch

S&P Dow Jones Indices
An S&P Global Division



Download the eBook

Download the 2019 Secure Retirement Guidebook.
Valuable market insights designed to help you plan a better,



more secure retirement. Learn how much you actually need to retire. Protect your nest egg, and more..

Get the eBook

PRING TURNER
Investment Management

CELEBRATING 40 YEARS

Get the Latest Updates and News

Email

Submit

Keeping You Informed

Recovery or Recession? Ask the Stock Market Stupid!

July 1, 2019

Latest Housing Data Offers Some Green Shoots

May 17, 2019

Wanna Play A Game?

April 26, 2019

Let's Connect

info@pringturner.com

925.287.8527

Pring Turner
Investment Management
1600 S. Main Street, #375
Walnut Creek, CA 94596