

**WILLNER HELLER** LLC

Private Wealth Management

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We Manage Customized Portfolios for  
**INDIVIDUALS & SMALL BUSINESSES**

Your wealth manager should have one main goal; to be your greatest financial advocate.

*Willner Heller chooses the strongest financial products and provides intelligent investment solutions for each client.*

As a Registered Investment Advisor, Willner Heller has a fiduciary responsibility to always act in our client's best interest. We are fully independent and have no conflicts of interest. Our firm is able to offer private wealth management services that are unbiased and completely objective.

Many large financial firms create, package and sell proprietary products to the end user. These big companies exclusively market their own research and analysis to their customers who have no access to alternative opinions or ideas. As an institutional money manager, Willner Heller is able to use a variety of research and data to help our clients achieve the best possible results.

Willner Heller is a fee only wealth management firm. We do not receive commissions on trades. Our goal is the same as our client's; maximizing portfolio returns, managing market risk and maintaining tax efficiency at all times.

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to learn more about the Willner Heller advantage*

Matt Heller

Matthew D. Heller is a graduate of the University of Southern California and is a Registered Financial Consultant. Matt began his career in financial services in 1991 and has worked in wealth management with a variety of large firms including Wells Fargo Securities, Prudential Securities Banc of America Investment...

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Kenneth Willner

Kenneth L. Willner attended from San Diego State University and joined the firm, Milton F. Willner & Co. Certified Public Accounting. Ken worked with his father Milton F. Willner until Milt passed away in 2002. Ken renamed the firm Willner & Ornedo when Mario Ornedo became a partner...

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On the Following Clients*

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