

Your Future. Managed.

Get clear financial advice to help yourself and the ones you love most.

👉 GET STARTED



Gain clarity regarding your financial future.

Receive a personal financial dashboard tailored to your specific goals.



Stay on track to meet your goals.

Get financial guidance and advice from a team of seasoned professionals.



Enjoy a personalized investing experience.

Benefit from a wide array of investment options aligning with your unique needs.

The future is uncertain

Every day we're reminded of the challenges of an uncertain future. Early on, these challenges may seem far away—but they'll catch up to you before you know it. Take control of your future today.

> TALK TO AN ADVISOR



10x

The multiplier for how much riskier retiring is today than it was just 10 years ago.

ARE YOU PREPARED?

Source: Kiplinger

\$275,000

The amount a 65-year-old couple may need to cover medical expenses throughout retirement.

WHAT'S YOUR PLAN?

Source: Fidelity

40%

The percentage of Generation Xers and millennials who have no retirement strategy.

GET STARTED TODAY!

Source: CNBC

We understand

Managing your financial future doesn't have to be overwhelming.

Together, we'll craft a personalized strategy to help you reach your financial goals. As your fiduciary, the only factor driving our recommendations is what we believe fits your specific situation.

› LET'S GET STARTED



Financial planning and investment management

Financial services to help you and the ones you love most

We are entirely focused on you

Our company, our advisory teams, and our investment portfolios were built with you in mind.

First, we'll design a strategy aimed at helping you reach your unique goals. Then we'll find suitable investments to match your objectives. We make decisions with your well-being in mind—not our compensation.

As a client of Lucia Capital Group, you'll have access to our dedicated team of CERTIFIED FINANCIAL PLANNER™ professionals and Chartered Financial Consultants as well as our in-house investment team. Think of us as your financial coach; we'll help you design a game plan, provide investment recommendations, and implement your strategy. Behind the

scenes, our dedicated team of investment management professionals and CFAs will actively manage your portfolio using our disciplined processes.



LEARN MORE

› **START BUILDING YOUR PLAN**



Attain peace of mind and achieve your life's purpose

Ray Lucia Jr., chairman and CEO of Lucia Capital Group, talks about what it's like to be a client. Here are just some of the benefits you'll enjoy as a client of our firm:

- ✓ A dedicated financial advisor
- ✓ A personal financial dashboard
- ✓ A team of credentialed and experienced professionals working on your behalf
- ✓ Independent investment advisory and brokerage services
- ✓ A personalized investing experience
- ✓ Help with anything from wealth accumulation to wealth distribution and estate planning
- ✓ Ongoing financial education
- ✓ Periodic meetings and reviews

› **GET STARTED TODAY**



Joe P. Lucia
President

Ray Lucia Jr.
Chairman & CEO

Gain control of your financial future

Get started in three easy steps

- 1** **Schedule your appointment**
You'll start by setting up an appointment with one of our financial advisors. With offices nationwide, we make it easy to get in touch with someone to discuss your retirement planning goals.
- 2** **Personalize your strategy**
When do you plan to start retirement? Will you continue to work? We'll discuss all of the challenges you may face in retirement, because achieving your goals begins with personalized planning.
- 3** **Realize your future. Managed.**
Planning for your retirement shouldn't be a guessing game. If you're like many, you want a sense of direction and assurance in your ability to meet your goals. You need a plan that uses a sound strategy, balances risks, and addresses your upcoming challenges.

Retirement planning starts with education

View our full range of on-demand videos, articles, and live events dedicated to helping you understand financial planning and investing

New Articles



LUCIA CAPITAL GROUP WEEKLY

Are You Doing Enough to Plan for Longevity?

JULY 3, 2019



LUCIA CAPITAL GROUP WEEKLY

Be Careful With High-Yielding Stocks

JUNE 27, 2019



LUCIA CAPITAL GROUP WEEKLY

5 Ways Your Retirement Plan Could Change This Year

JUNE 20, 2019

About Lucia Capital Group

Lucia Capital Group, along with its family of financial services companies headquartered in San Diego, California, offers a fully integrated wealth platform providing end-to-end investment strategies from wealth advice to asset management and insurance. We are truly committed to helping our clients achieve their financial goals.

Consisting of several CFP® and CFA® professionals and ChFC® advisors, the team at Lucia Capital Group is knowledgeable and experienced in the areas of financial planning, asset management, investment brokerage, and insurance services. With more than 15 locations nationwide, we offer comprehensive, integrated financial planning and wealth services to clients of all types and accounts of all sizes.

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Pinhook Capital, LLC, is a registered investment advisor, offers model portfolio advisory services to Lucia Capital Group, and is under common ownership and control with Lucia Capital Group and Lucia Securities, LLC.

Check the background of this firm on FINRA's **BrokerCheck**.

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