

Galvin, Gaustad & Stein, LLC

7377 East Doubletree Ranch Road
Suite 250
Scottsdale, AZ 85258

Phone:

480.776.1445

Toll-Free: 800.554.1154

Fax:



Welcome to Galvin, Gaustad & Stein, LLC.

We are an independent Financial Wealth Management services firm with headquarters located in Scottsdale, Arizona, serving clients around the globe. We provide comprehensive concierge service for high net worth clients helping them realize their long-term financial goals through the design and management of carefully curated custom portfolios created specifically for a client's return objective and desired risk level. Our highly regarded national experience within the industry has made it possible to develop a proprietary process to deliver customized investment solutions after identifying a client's specific objectives. With a veteran investment team who hold the Chartered

Financial Analyst® designation and our CERTIFIED FINANCIAL PLANNER™ Professionals, we work closely with clients and their professional advisors (attorneys, accountants) to keep expenses and taxes as low as possible with a goal of overachieving the appropriate benchmark return. We apply both a quantitative and qualitative analysis in the screenings of the holdings of the personal financial plans with custom created portfolios. This highly personalized white glove service from a team of industry veterans builds and manages custom portfolios, while most other firms offer "model" portfolios, providing all clients with identical portfolios. Custom based holdings are created with client input of their selective risk level and preference for companies they may want to own or not own, as they can be as actively involved in portfolio management to the extent they would like to be.

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