

Westside Investment Management, Inc.

As an independent investment management firm we provide Wealth Consultation Services, including comprehensive [financial planning](http://www.westsideim.com/p/financial-planning) [{{http://www.westsideim.com/p/financial-planning}}](http://www.westsideim.com/p/financial-planning) and [investment management](http://www.westsideim.com/p/investment-management) [{{http://www.westsideim.com/p/investment-management}}](http://www.westsideim.com/p/investment-management) to retirees, executives, successful professionals, and business owners.

Learn more [{{http://www.westsideim.com/p/our-unique-service-model-places-your-needs-first}}](http://www.westsideim.com/p/our-unique-service-model-places-your-needs-first)

Personal, Local Service Backed by National Resources

We are headquartered in beautiful Santa Monica, California and work with clients across the United States. [James Frawley](http://www.westsideim.com/team/james-frawley-chfc-cfs) [{{http://www.westsideim.com/team/james-frawley-chfc-cfs}}](http://www.westsideim.com/team/james-frawley-chfc-cfs), our managing principal is located at our Santa Monica office, while [Todd Clark](http://www.westsideim.com/team/todd-clark-cfs) [{{http://www.westsideim.com/team/todd-clark-cfs}}](http://www.westsideim.com/team/todd-clark-cfs) is the managing principal for our Oklahoma City office.

Learn more [{{http://www.westsideim.com/team}}](http://www.westsideim.com/team)

Guiding You Into and Through Retirement

As an independent firm, we have access to a wide and diverse range of financial strategies and services to help ensure that your wealth is strategically managed in line with your financial goals.

- [Retirement planning](http://www.westsideim.com/p/retirement-planning) [{{http://www.westsideim.com/p/retirement-planning}}](http://www.westsideim.com/p/retirement-planning)
- [Insurance](http://www.westsideim.com/p/insurance) [{{http://www.westsideim.com/p/insurance}}](http://www.westsideim.com/p/insurance)
- [Financial planning](http://www.westsideim.com/p/financial-planning) [{{http://www.westsideim.com/p/financial-planning}}](http://www.westsideim.com/p/financial-planning)
- [Estate planning](http://www.westsideim.com/p/estate-planning) [{{http://www.westsideim.com/p/estate-planning}}](http://www.westsideim.com/p/estate-planning)
- [Investment management](http://www.westsideim.com/p/investment-management) [{{http://www.westsideim.com/p/investment-management}}](http://www.westsideim.com/p/investment-management)
- [Executive compensation plans](http://www.westsideim.com/p/executive-compensation-plans) [{{http://www.westsideim.com/p/executive-compensation-plans}}](http://www.westsideim.com/p/executive-compensation-plans)
- [Tax and gifting strategies](http://www.westsideim.com/p/tax-strategies) [{{http://www.westsideim.com/p/tax-strategies}}](http://www.westsideim.com/p/tax-strategies)
- [Real Estate investments](http://www.westsideim.com/p/real-estate-investment-options) [{{http://www.westsideim.com/p/real-estate-investment-options}}](http://www.westsideim.com/p/real-estate-investment-options)

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