DAVIS SEILEY
WEALTH MANAGEMENT

Wealthview

Davis & Seiley Wealth Management

Experience

DAVIS SEILEY
WEALTH MANAGEMENT

Wealthview

Holistic Planning

Fiduciary Standard

Individualized Service

Marc Davis, CFP®

PARTNER, PRESIDENT

Joe Seiley, MBA, CRPS®

PARTNER, CFO

Janelle McCreary, CFP®
CLIENT SERVICE MANAGER

Eric Davis
FINANCIAL PLANNING ANALYST

Tara Alkire, FPQP®
OFFICE MANAGER

Prospective Client Info

Initial Consultation

Financial Planning Fees

Investment Management Fees

ADV 2 →

Initial consultations cover:

1. Your financial history and background and what is important to you.
2. Important personal and professional transitions that may have financial implications.
3. Financial and investment principles that you want followed and/or understood.
4. Your financial goals, objectives, time tables and the resources available to meet these.

We review:

- Assets and Liabilities

- Investment Portfolio

Please bring relevant documents with you to your initial appointment.

There is no charge for this initial hour consultation.

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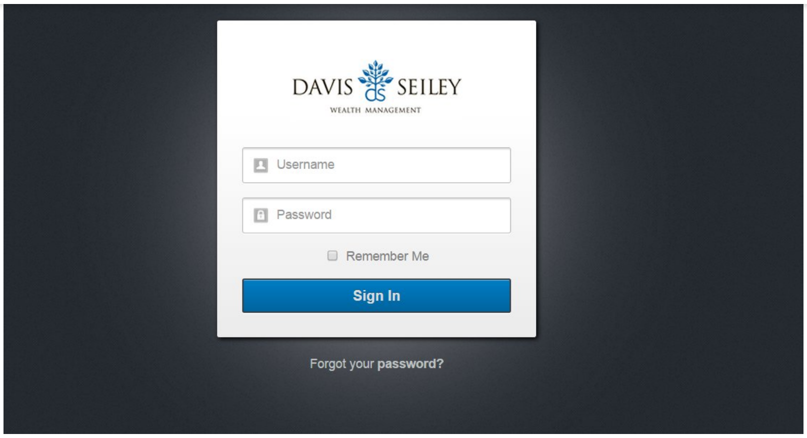


WealthView

Your Personal Financial Website

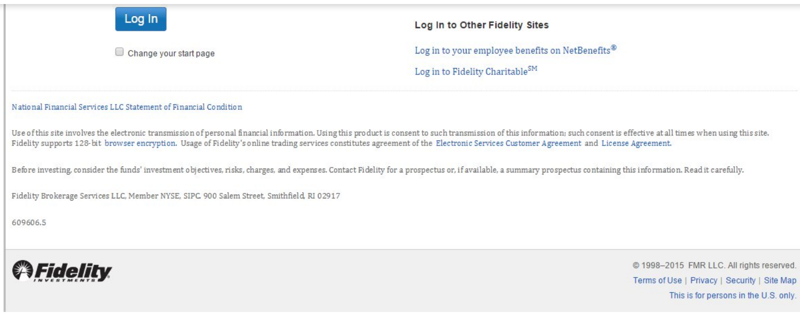
A complete financial picture of you; all of your accounts in one place, continuously updated and accessible from anywhere.

If you haven't used Wealthview before, contact Tara in our office and she'll send you a link to register. She can also send you a link to reset your password if you've forgotten.

If you are already registered and want to learn more about how to use Wealthview select the "Using Wealthview" button below.

Access Site

Using Wealthview

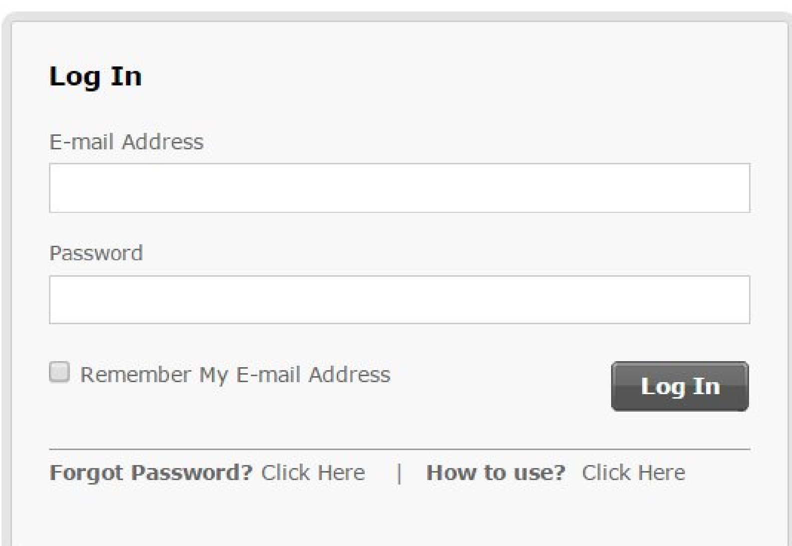


Fidelity Login

Fidelity's site provides up to date account values, access to statements, account history and more. This is where you'll want to login to get your tax forms and historical statements.

Access Site

Using Fidelity



Morningstar Web Portal

quarterly performance reports and billing statements. If you have any qu
please let us know.

Access Site

Using Morningstar

Events and Calendar

Events

their guests. The dates of the upcoming workshops are:

Wednesday, January 30th, 2019

Thursday, May 2nd, 2019

Thursday, November 7th, 2019

The topics of the events will be known closer to the date since they are typically based on current hot topics.

The events will take place at the La Mesa Community Center (4975 Memorial Drive, La Mesa, CA 91942).

View Larger Map

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Questions? Contact us.

NAME

EMAIL

PHONE

MESSAGE

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Send

LOCATION

5400 Connecticut Avenue,
Suite 100
La Mesa, CA 91942

CONTACT

info@davis-seiley.com
Phone: 619-697-2684
Fax: 619-697-8257

Remote Meetings are available for those clients who live out of the San Diego area. We can do this over the phone, using Skype, and/or using a service called join.me. Click Here to learn more.

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