

# Davis & Seiley Wealth Management



Experience

## Holistic Planning



## Fiduciary Standard



## Individualized Service

[Our Team](#)

[Our History](#)

[Our Services](#)

[Service Commitment](#)

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

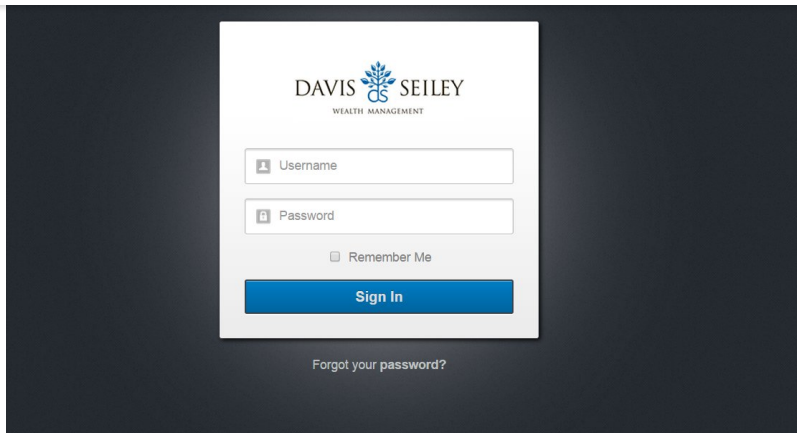
Wealthview

Please bring relevant documents with you to your initial appointment.

**There is no charge for this initial hour consultation.**

Logins

Resources



## 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](#)

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Log In

Change your start page

Log In to Other Fidelity Sites

Log in to your employee benefits on NetBenefits®  
Log in to Fidelity Charitable™

Wealthview

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## 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

### Log In

E-mail Address

Password

Remember My E-mail Address

Log In

[Forgot Password? Click Here](#) | [How to use? Click Here](#)



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

Wealthview

Access Site

Using Morningstar

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## Events and Calendar

Events

their guests. The dates of the upcoming workshops are:

Wealthview

**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](#)



Questions? Contact us.

NAME

EMAIL

PHONE

MESSAGE

Send

**LOCATION**



5400 Connecticut Avenue,  
Suite 100  
La Mesa, CA 91942

**CONTACT**

[info@davis-seiley.com](mailto: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.

PHONE

619-697-2684

Wealthview

ADDRESS

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