

- HOME
- ABOUT
  - HOW YOU BENEFIT
  - WHO WE HELP
  - ABOUT RS CRUM
  - MEET OUR TEAM
  - RS CRUM WAY
- SERVICES
  - RELATIONSHIPS
  - INVESTMENTS
  - PERSONAL FINANCIAL PLANNING
  - SUDDEN LIFE CHANGES
- NEWS & MEDIA
  - RS CRUM ARTICLES
  - RSC IN THE COMMUNITY
  - RSC IN THE NEWS
- CONTACT
  - SCHEDULE AN APPOINTMENT
  - ASK A QUESTION
- CALL: (949) 428-9696
- CLIENT LOGIN

CELEBRATING OVER 40 YEARS OF FINANCIAL MANAGEMENT

- [Home](#)
- [About](#)
  - [How You Benefit](#)
  - [Who We Help](#)
  - [About RS Crum](#)
  - [Meet Our Team](#)
  - [RS Crum Way](#)
- [Services](#)
  - [Relationships](#)
  - [Investments](#)
  - [Personal Financial Planning](#)
  - [Sudden Life Changes](#)
- [News & Media](#)
  - [RS Crum Articles](#)
  - [RSC in the Community](#)
  - [RSC in the News](#)

- [Contact](#)
  - [Schedule An Appointment](#)
  - [Ask A Question](#)
- [CALL: \(949\) 428-9696](#)
- [Client Login](#)

# • TAKING THE STRESS OUT OF PERSONAL FINANCE SINCE 1976

[About RS Crum](#)

# • HOW CAN RS CRUM HELP YOU?

[FIND OUT](#)

# • OUR CLIENTS ARE FAMILY TO US.

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RS Crum is a [fee-only financial planning](#) and [investment management](#) firm located in Newport Beach, California serving clients in Orange County, surrounding areas, and across the country. RS Crum specializes in providing objective financial advice to help clients manage, grow, and protect their assets during their working lives and through retirement. As fiduciary consultants, we prefer to serve our clients – not sell to them.

## RELATIONSHIPS

Our clients are family to us. From the very first phone call, you will quickly get a sense that our team is genuinely interested in getting to know you. We value relationships and take the time to ask ...

[LEARN MORE](#)

## PERSONAL FINANCIAL PLANNING

We are passionate about planning! Our experience suggests that goals are most likely to be achieved when a carefully designed plan is combined with clear communication and a commitment to execution...

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## INVESTMENTS

A well thought out investment strategy is critical to your financial success, but most people don't have the time or resources to create one, not to mention the ability to make adjustments as circumstances evolve...

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## COMPLIMENTARY CONSULTATIONS

We offer a complimentary introductory meeting designed specifically to learn more about your situation, goals and objectives as well as to establish what we can do to help. All information provided and/or discussed in this meeting is held in strict confidence.

[BOOK TODAY!](#)

## HOW YOU BENEFIT

We all want peace of mind with respect to our financial future and the decisions we make along the way. Our clients benefit in many ways from our unique, down-to-earth approach to wealth management...

[LEARN MORE](#)

## THE RS CRUM WAY

From our beginning in 1976, RS Crum has been different. Different in how we treat our clients, different in how we work with each other, and different in the results we achieve.

[READ MORE](#)

## MEET OUR TEAM

Our highly experienced team has carefully been assembled over the years to make sure we have the right people in place to deliver an exceptional and highly personalized wealth management experience...

[LEARN MORE](#)

Learn more about our 'fee-only' approach to wealth management whereby our only source of compensation comes from fees paid directly by our clients.

### WHY FEE ONLY?

### RESOURCES

Here are links to certain websites offering additional RS Crum resources or education for those seeking more information about RS Crum or the Financial Planning industry as a whole.

[Certified Financial Planner Board of Standards  
CFP®](#)

[National Association of Personal Financial Advisors NAPFA](#)

[Financial Planning Association  
FPA](#)

### CONTACT US

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[Directions](#)

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- [Home](#)
- [News & Media](#)
- [Contact](#)
- [Privacy Policy](#)

