

Empower Yourself

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We work with you to build a solid plan for your future, with a collaborative approach that is focused on your needs, concerns, opportunities and goals.

Our mission is to empower you to feel financially secure and comfortable, especially during and after times of significant change.

Our services include:

- [financial planning](#) and retirement planning
- [investment management](#), including [socially responsible investing \(SRI\)](#) strategies
- [wealth management](#)
- [divorce financial analysis](#)
- [retirement plan advice](#)

We're an independent, fee-only practice, with offices in Portland, Oregon and Santa Cruz, California. Our firm's CERTIFIED FINANCIAL PLANNER™ principals are highly educated, experienced and credentialed, with decades of experience in helping clients live their ideal lives.

Watch our video to see what makes Springwater different



WEALTH MANAGEMENT

Let us help you integrate your values and goals with your resources - to grow, protect, enjoy and transfer your wealth.

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FINANCIAL PLANNING

Do you have a clear, comprehensive and personalized financial plan to help you achieve your goals?

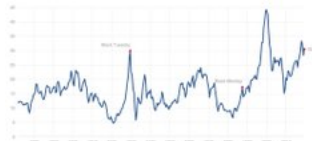
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Jul 2, 2019

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Our Bay Area office is located in downtown Santa Cruz.

615 Water Street
Santa Cruz, CA 95060

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