

# BERGQUIST WANG, LLC

## Welcome

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*We believe time is a Client's most valuable asset and best spent on their passions and in comfort knowing their financial affairs are well-managed.*



## Our Approach

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BERGQUIST WANG is a boutique firm with the mission of providing highly-personalized, comprehensive, and fee-only financial planning and investment advisory services to clients seeking creative solutions to their unique individual situations.



## Advisory Services

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### Comprehensive Financial Planning

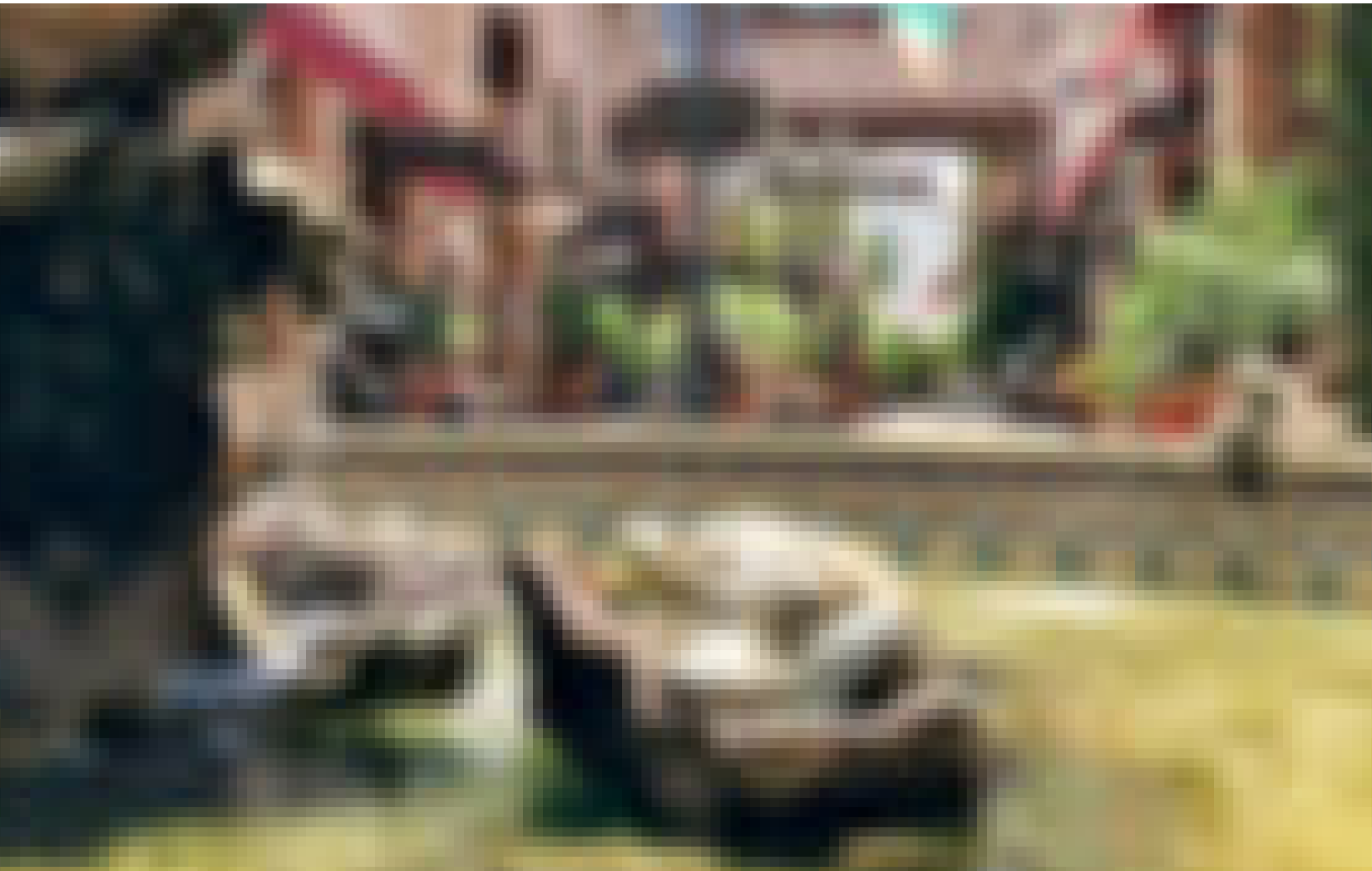
At BERGQUIST WANG, we develop a customized and comprehensive plan for each financial planning client. This process begins with a thorough review and deep discussions surrounding goals and objectives. Recognizing topics of personal finance can be a sensitive area, we focus on building a foundation of comfort and trust. We find this step to be a key aspect of our work as deliberate and thoughtful conversations can unlock a client's true desired outcomes.

Our team is highly-skilled and well-experienced in utilizing unique planning strategies to create a path towards those identified goals. This includes tax considerations, estate planning alternatives, retirement aspects, gifting strategies, and a variety of other planning matters. Once the financial plan is fully developed, we walk with our client throughout the implementation and monitoring stages.

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clients portions.

We implement a global, multi-asset class approach. Our investment process includes a tactical asset allocation overlay, which allows us to balance risk versus return in changing market environments. Additionally, we utilize our proprietary stock selection model which is based on concepts that have a proven positive relation to the expected relative price performance of a stock. This unique model, which was extensively back-tested and has been running live since early-2000, assists us in identifying attractive equity investments, which then go through a rigorous fundamental analysis prior to selection.



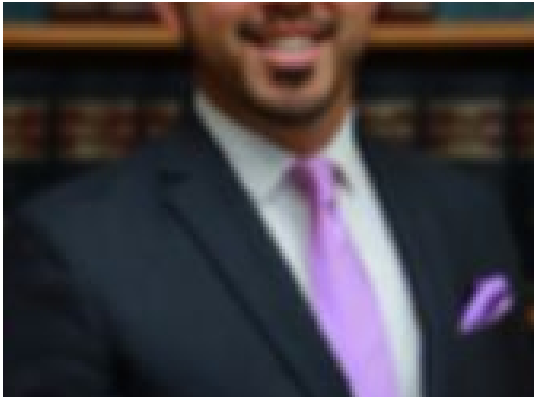
## The Team

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## Contact

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