



# Private Wealth Services

Portfolio Management | Estate Planning | Tax Planning

We provide financial solutions to the entrepreneurs, founders, innovators & executives who are the engine of today's knowledge economy.

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**CONTACT**

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## Portfolio Management

We approach portfolio management through the lens of a Fundamental Investor utilizing a balanced asset allocation to protect principal while still providing returns designed to increase purchasing power over time.



## Tax Planning

The tax conversation is an essential component of any planning relationship. We help with tax planning for stock option grants, QSB Stock, qualified retirement plans, and charitable/gifting strategies.



## Estate Planning

With decades of experience dealing with Domestic and Cross Border Estate planning situations, allow us to assist you in protecting the legacy you've worked hard to create for generations to come.



## Financial Planning

Life is fraught with many challenges ranging from the cost of Education to when's the right time to retire. Allow us to draft a Financial plan for you that allows one to comfortably navigate the unforeseen events in the future that we all experience.

[Home \(/home\)](#) | [Services \(/services\)](#) | [About \(/about\)](#) | [Contact \(/contact\)](#)

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SP Asset Management is a Private  
Wealth Management firm specializing  
in Portfolio Management, Tax Planning  
and Estate planning for Silicon Valley's  
Tech and Entrepreneurial Leaders.