UNION FINANCIAL PARTNERS
Committed to your Success

Our Mission

Our mission is to provide our clients with the advice, focus, clarity and strategic tools they need to achieve long-term financial success.

Why Choose Union Financial Partners As Your Financial Advisor?

We are a fee only financial advisor, which means that we work exclusively for you, our client.

Our motivations, actions, advice, recommendations, and investment instruments are unconditionally aligned with your best interests, the growth of your wealth, and the attainment of your financial goals. Our client-focused philosophy and deep desire to help pervades everything we do.

We know that everyone has a different set of circumstances. We work with every one of our clients in a very personal, individualized manner. After thoroughly analyzing your unique financial situation, we'll make concrete recommendations to improve it. Because we are a fee only financial advisor, you can be assured that we'll never recommend that you buy, sell, or trade financial instruments so that we can make a commission.

businesses.

Our clients include: young people who want to start out their financial life going in the right direction; middle-aged people who want to get on course and improve the efficiency of their investment, tax and retirement programs, and pre-retirees and retirees who want to enjoy their money, stress-free.

Financial Security And Peace-Of-Mind

To learn more about how our fee only financial advisor services can help you achieve your financial goals, please contact us for a free consultation: 415.563.3000 or email info@uf.flywheelsites.com

Associations & Certifications

FPA FINANCIAL PLANNING ASSOCIATION

FPA FINANCIAL PLANNING ASSOCIATION OF SAN FRANCISCO

CFP CERTIFIED FINANCIAL PLANNER

SIPC

SPORTS FINANCIAL ADVISORS ASSOCIATION

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