

# We are a boutique firm that assists successful individuals build and preserve their wealth.

Walker Financial Advisors, Inc. is an independent fee-only Registered Investment Advisor.



### INVESTMENT MANAGEMENT

Our private client service gives you on-going access to a seasoned CFP® practitioner who will design and manage a tax-efficient portfolio to meet your goals. (\$500,000 minimum portfolio size)

[Get Started](#)



### Wealth Management & Financial Planning

Objective unbiased advice regarding investing, retirement, tax, or estate planning, education funding, and risk management. Offered via an hourly rate or fixed fee.

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### Governmental 457(b) Plans

Walker Financial Advisors also does business as California 457 Benefits, which provides plan administration and investment advisory services to plan sponsors and participants.

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## The Walker Financial Story


Walker Financial is an independent, fee-only registered investment advisor. We specialize in the design and management of investment portfolios for professionals, business owners, executives, and affluent retirees. Walker Financial offers customized portfolio management solutions tailored to your individual circumstances and needs. Scott Walker, founder, is a Certified Financial Planner™. Scott and his associate Warren Isenberg, CFP®, have worked together since 1998 and currently manage over \$127 million for 126 clients.

[About Walker Financial](#)

## Are You Ready To Take The Next Step?


Scott D. Walker, CFP®

Warren B. Isenberg, CFP®  
President, and Co-Chief Investment Officer



Chairman, CEO, and Co-Chief Investment Officer

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