Pacific Wealth Management®

Sound Management for a Secure Financial Future

Intelligent financial solutions for affluent investors

Client Login

Pacific Wealth Management®

A fee-based, fiduciary firm providing wealth management services for families, retired individuals, professionals and business owners.

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What You Can Expect

Our Values

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As a fiduciary, our moral principles dictate everything we do, ensuring the guidance we provide aligns with this higher ethical standard.

Accountability

Our entire team works on your behalf and delivers on what we say we are going to do.

Transparency

Our disciplined communication keeps you informed and in control of your financial world.

About Us

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How We Do It

At Pacific Wealth Management, we embrace the higher fiduciary responsibility that comes with being an independent advisory firm, aligning our objectives with yours and working within a compensation model that ensures we act in your best interests at all times.

James C. Kuntz, CIMA

CO-FOUNDER / MANAGING DIRECTOR

Mark C. Hill, CFP®, CDFA

CO-FOUNDER / WEALTH ADVISOR

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Justin C. Kuntz, CFP®, CDFA

DIRECTOR OF FINANCIAL PLANNING / WEALTH ADVISOR

Melanie Blakney

OPERATIONS MANAGER

Michael L. Lim, CRPS

DIRECTOR OF RESEARCH / PORTFOLIO MANAGER

J.P. Mayer, M.S.B.A.

WEALTH PLANNER / FINANCIAL ANALYST

Financial Services We Offer

Financial Planning

Retirement Planning

Executive Compensation

Proactive Asset Management

Financial Planning

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Pacific Wealth Management®

The intricacies of reaching your lifestyle goals before and after retirement are always challenging and often complex. Pacific Wealth Management's in-depth approach to financial planning helps you begin this vital process.

Our comprehensive financial planning will provide you with a clear understanding of every aspect of your financial life — enabling us to optimize your path towards achieving your goals. This allows you to spend more time on the things you care about most.

We embrace our role as your chief financial officer, ensuring each financial decision is intelligently analyzed, deliberate, complementary and always in your best long-term interest. As life circumstances evolve, we will be there to provide counsel and help you make informed planning decisions.

Our comprehensive financial planning services include:

Estate Planning Analysis

Tax Planning

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Dependent Assistance

Risk Management & Insurance Needs Analysis

Concentrated Stock

Insights

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Read More

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FAQ

What are your core services?

Are your advisors credentialed?

How are my assets protected?

What does “fee-based” mean?

What does it mean to be a fiduciary?

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Your Money. Your Dreams

PACIFIC WEALTH MANAGEMENT®

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PHONE

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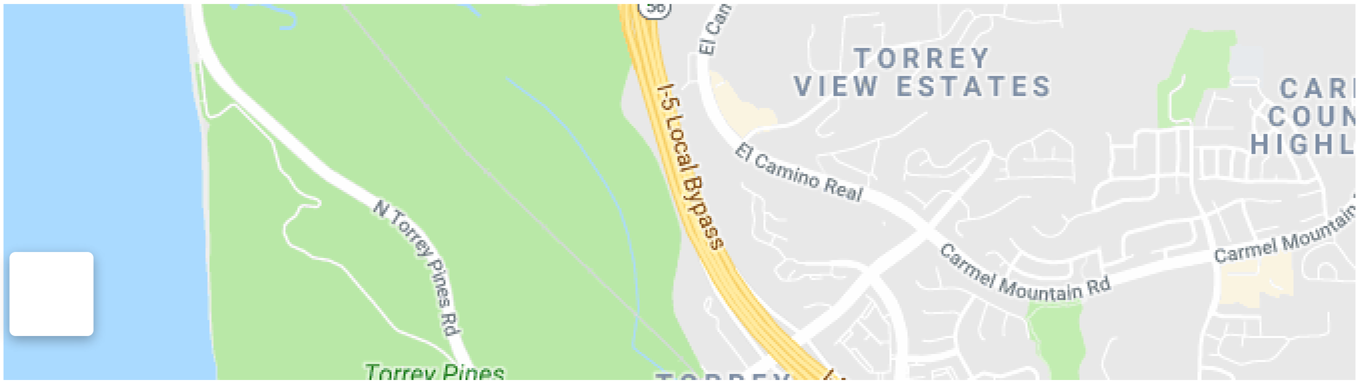

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