



**MONTEREY  
PRIVATE  
WEALTH**



### PEACE OF MIND

Our planning process gives you confidence about your financial future.

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### WILL YOU HAVE ENOUGH?

Our Six-Step Planning Process highlights the issues most important to you.

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### NO HIDDEN FEES

Our Fiduciary Promise and 100% fee-only approach eliminates conflicts of interest.

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### INVEST WITH TRUST

Have more confidence in your portfolio through proven, sound investing principles.

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## FINANCIAL ADVISORS IN WEALTH MANAGEMENT



Check the background of this investment professional ▶



## MEET OUR TEAM

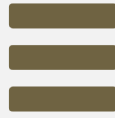
As your financial matters have grown more complex, it's not uncommon to find yourself bogged down in the tedious details of managing wealth. Like most successful people, you'd rather spend your time focused on what matters most to you – your family, your business, your life. We help you do that.

To schedule your private consultation with a fee-only financial advisor, please call us at 831-372-3426, or use our contact form. We have offices in Monterey and Pleasanton California, and we have clients throughout the San Francisco Bay Area, Monterey Peninsula and Central Coast.



## Investment Management

Investing to Preserve and Grow Wealth



## Financial Planning

Planning – a Roadmap for the Future



## Business Retirement Plans

Business Retirement Plans in Monterey & Pleasanton, CA

To schedule a private consultation with one of our financial advisers, call us at 831-372-3426 or 925-462-8005

CONTACT US NOW.

## BLOGS

Choosing the best acco



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JUL 5, 2019

Monterey Herald , brokerage accounts

Q: My partner and I are looking to open a brokerage account, but we are confused about which type of account is best. Ca...

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## When your IRA produces taxable income

JUL 5, 2019

Monterey Herald , IRA , Self-directed IRA , Taxes

I recently received a phone call from an individual concerned about his self-directed IRA. Several years ago, he investe...

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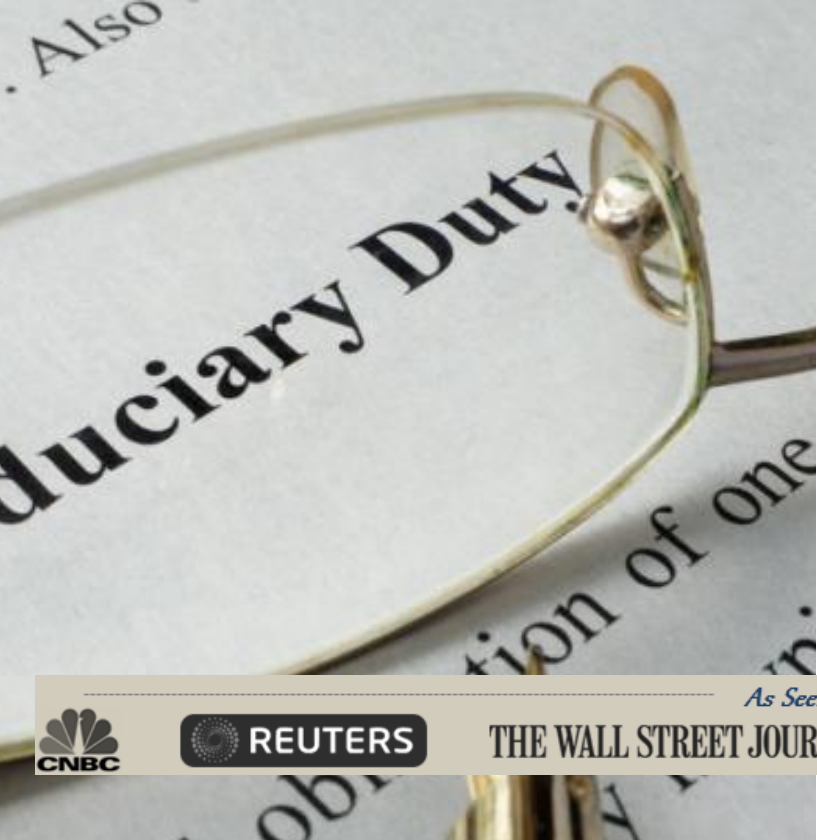
## Do I still need a fiduciary?

JUN 20, 2019

Monterey Herald , fiduciary , Finance



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In last week's column I wrote about the SEC's new regulation for investment advisors and broker-dealers called Regulator...

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*As Seen In...*  
**THE WALL STREET JOURNAL.**

**YAHOO! FINANCE**

Monterey County  
**The Herald**

**Pleasanton Weekly.com**

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[Privacy Policy](#)

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