Tell us what you want to accomplish in life and we'll provide the expertise and guidance to help you achieve your dreams.

OUR MISSION

Everyone wants to have enough money to live well, but what do you really want to achieve with your wealth? What are your hopes and dreams?

Learn about our mission >

OUR SERVICES

At ZRC Wealth Management our goal is to provide sound financial advice and long-term strategies to help you manage and grow your wealth.

Learn more about our services >

OUR TEAM

We invite you to learn more about our background and experience, and welcome you to sit down with us for a meeting to get to know us in person.

Meet our team >

We are committed to helping our clients make smart decisions about their wealth so that it can do as much good as possible.

We provide personalized strategies that take into account all aspects of your financial life and offer guidance, clarity of thought, and expertise to help you gain confidence in a more secure financial future.

In order to help you maximize your potential for success in all areas of your financial life, we take a comprehensive approach. We focus on trying to enhance the security of our clients' accumulated wealth during their lifetimes and beyond.

As independent advisors we act as valued partners who can help tie your investment plan to your overall life plan. Not only can we provide you with guidance, counseling, monitoring and discipline, we can be a valued catalyst to encourage you to plan ahead for the expected…and unexpected. We work as your partner, providing you with counsel on an ongoing basis.

Above all, we are committed to helping our clients make smart decisions about their wealth so that it can do as much good as possible for those you care most about.

Get in touch with us to schedule a meeting ›

"ZRC Wealth Management is unique because the client is the focus of our attention. They come first in everything we do and solutions are centered around them."

— Barry Mendelson, CFP

Financial Advisor & Managing Partner

From left to right: Thomas Howard, Barry Mendelson, Kelly Gillette, Ryan Kosakura.

CONTACT US

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St Helena | 925-962-5600

Complete Contact Information »
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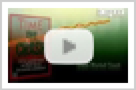

Best Time to Invest

What if the Stock Market Dropped 20%?

DESIGN, BUILD, PROTECT

If you're interested in learning more about how we work with clients and the services we provide, download our brochure:

Design, Build, Protect »

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