

Create a Meaningful Life

Wealth planning centered around you.

SHOW ME HOW →



Wealth is About Well-being™

Our pursuit of money is motivated by our desire to live meaningful and happy lives. Unfortunately, modern society has put a disproportionate emphasis on the state of our finances; portraying that an ever-growing net worth is vital for fulfillment and prestige.

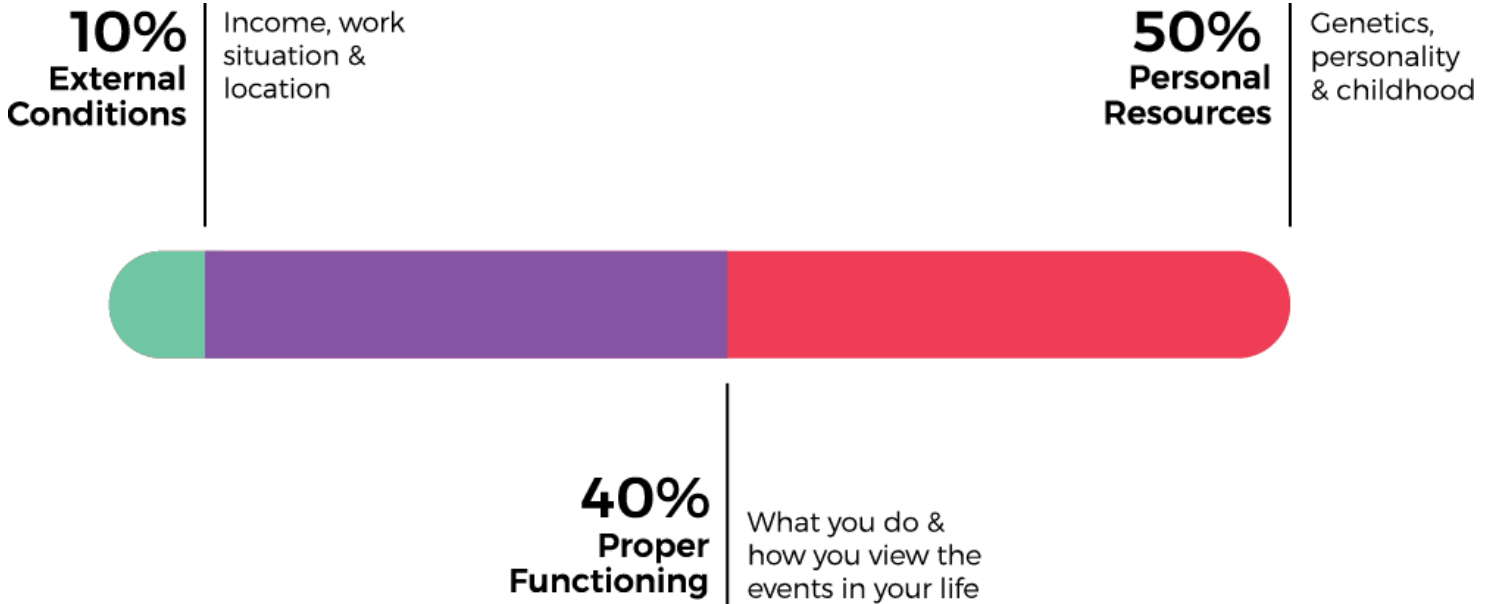
However, measuring a life's fulfillment solely on economic growth misses the fact that money is a tool, not a solution to well-being.





Money Is Only 10% of The Story

Research has shown that only a small portion of well-being is attributable to external conditions like income – **as little as 10%**.^{1,2,3,4,5}



Instead of focusing only on the 10%, our Human Centric Wealth Plans™ incorporate the entire make-up of your well-being, including how you feel.

Human Centric Wealth Planning™



Human Centric Wealth Planning™ is our tool to deeply understand who you are, evaluate what ^
have, and create innovative financial systems rooted in your actual needs. Separated into three parts,
Human Centric Wealth Planning™ is a framework that encompasses well-being discovery, resource
exploration, and systems creation.

DISCOVER WELL-BEING

Through our proprietary Well-being Profiles, we help you uncover insights about the
interconnecting components that make up your well-being.

EXPLORE RESOURCES

Together we will explore the financial, social and personal resources available to you, and ensure
they are used sustainably and intentionally.

CREATE SYSTEMS

We use our nearly 40 years of experience to create unique financial systems that address your
well-being insights with the resources you have.

HUMAN CENTRIC WEALTH PLANNING

A truly personalized wealth strategy at the center of what is feasible, sustainable and meaningful to you.

[Learn More](#)

PORTFOLIO MANAGEMENT

Actively managed to help you navigate through the most challenging market cycles.

[Learn More](#)

BUSINESS CONSULTING

Innovative solutions for your business's financial and organizational challenges.

[Learn More](#)

Welcome,
Luke and Jen Affluent

Accounts	+ Add Account
Cash	\$50,000 ▾
Credit Cards	\$0 ▾
Investments	\$9,702,792 ▾
Life Insurance	\$45,000 ▾
Loans	-\$200,000 ▾
Property	\$1,450,000 ▾
Stock Options	\$0 ▾

Net Worth

\$10,868,518 as of today

↑ \$979,710 this month ↑ \$979,710 year to date

Investments

\$9,791,957¹ as of today

↑ \$90,976² Change ↑ 0.94%² Change

Spending [View All](#)

Below the chart are several horizontal bars representing data points, which are currently blank.

Our Client Portal



Questions are Encouraged

Check the background of this investment professional on FINRA's [BrokerCheck](#).



HOW MUCH DOES IT COST TO WORK WITH WMBC?



WHAT FINANCIAL PRODUCTS DOES WMBC OFFER?



HOW DO I GET STARTED?



The Latest News



Stay in Touch

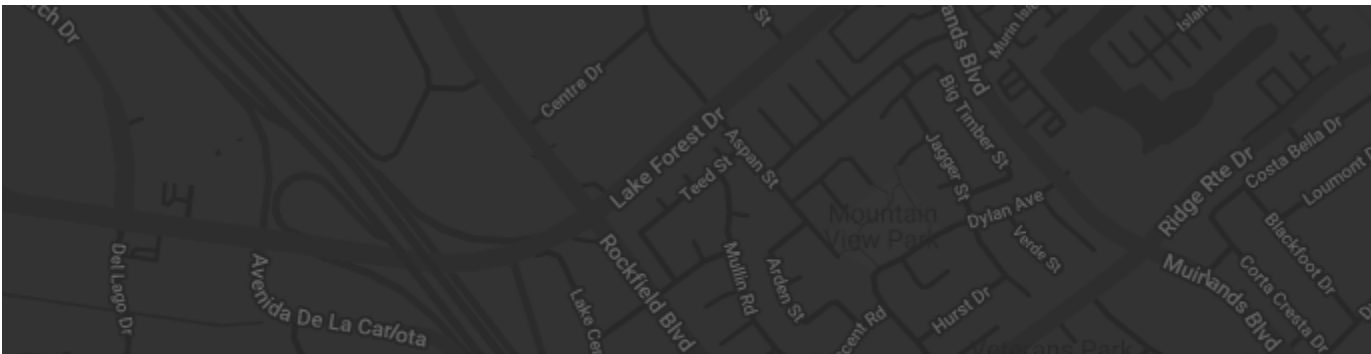
Your Name (required)

Your Email (required)

Your Number (required)

Sign me up for financial news and updates.

SEND





23201 Lake Center Drive #214

Lake Forest, CA 92630



949.829.9622



hello@wmbc.financial

23201 Lake Center Drive #214

Lake Forest, CA 92630

949.829.9622

hello@wmbc.financial

FOLLOW US



Check us out at [BrokerCheck](#).

[Legal, Privacy, Copyright & Trademark Information](#)

© 2019 WMBC. INVESTMENT ADVISORY SERVICES OFFERED THROUGH WMBC, A REGISTERED INVESTMENT ADVISOR / CA INSURANCE LICENSE #0719270 SECURITIES OFFERED THROUGH TRIAD ADVISORS, LLC. MEMBER FINRA/SIPC 5515 PEACHTREE PARKWAY / SUITE 3220 / NORCROSS, GA 30091 / P: 770-840-7444 WMBC IS A SEPARATE ENTITY FROM TRIAD ADVISORS, LLC INVESTMENT PRODUCTS AND SERVICES AVAILABLE ONLY TO RESIDENTS OF: ARIZONA (AZ), CALIFORNIA (CA), COLORADO (CO), FLORIDA (FL), IDAHO (ID), MONTANA (MT), NEVADA (NV), NEW JERSEY (NJ), OHIO (OH), UTAH (UT), WASHINGTON (WA) FEE-BASED ADVISORY SERVICES ARE AVAILABLE ONLY TO RESIDENTS OF: CALIFORNIA (CA), UTAH (UT) LICENSED TO SELL INSURANCE PRODUCTS IN THE FOLLOWING STATES OF: CALIFORNIA (CA), COLORADO (CO), CONNECTICUT (CT), FLORIDA (FL), MINNESOTA (MN), MISSOURI (MO), NEVADA (NV), NEW YORK (NY), OHIO (OH), OREGON (OR), TEXAS (TX), UTAH (UT), WASHINGTON (WA)



