YOU HAVE THE DREAMS. WE HAVE THE TOOLS.™

ABOUT PARKSHORE WEALTH MANAGEMENT

We are a family-owned **wealth management firm** with four decades of experience helping clients achieve their dreams. Based in Roseville, California, we work with financially responsible families and individuals throughout the greater Sacramento area, helping them build the future they envision.

As an independent, fee-only Registered Investment Advisor, we hold our financial advisors to a fiduciary standard and always put our clients' interests ahead of our own. In this way, our clients know that the financial blueprints we design for them are truly created to simplify their financial lives and help reach their goals.

LEARN MORE

“THE LONGER I LIVE, THE MORE BEAUTIFUL LIFE BECOMES.”

— FRANK LLOYD WRIGHT

FINANCIAL PLANNING THAT HELPS YOU SEE THE BIG PICTURE

We specialize in straightforward financial planning for our clients' complex financial problems. It's not unusual for someone to come to us with a chaotic, disorganized situation—essentially, a patchwork of wildly different pieces that aren't coordinated or working together in a way that helps them reach their goals.

When we work with you, we will bring together the pieces of your financial life so that you can see the big picture and make confident decisions about your future. Our comprehensive **financial planning services** encompass all your needs, from retirement and investments, to savings and taxes.

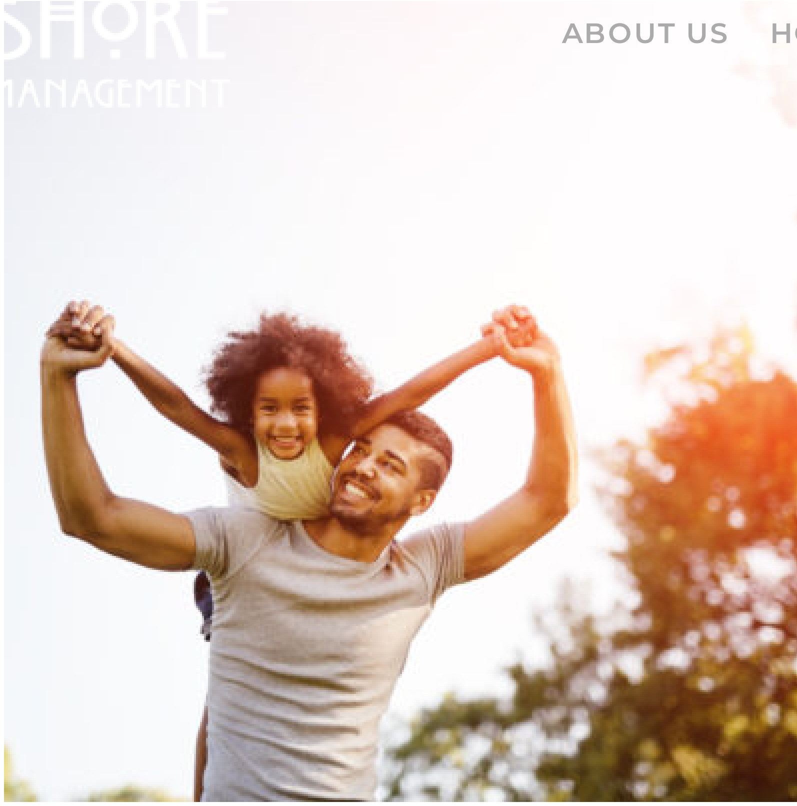
Schedule a Complimentary Phone Call

Want to see if our services are right for you? Schedule a complimentary, 15-minu phone call today.

SERVICE PROGRAMS TO FIT YOUR LIFE

As a financial planner, our goal is to help you build a firm financial foundation for the life you dream of. Because we recognize that your financial needs may evolve as your stage of life does, we offer three service programs to choose from.

TELL US ABOUT YOURSELF

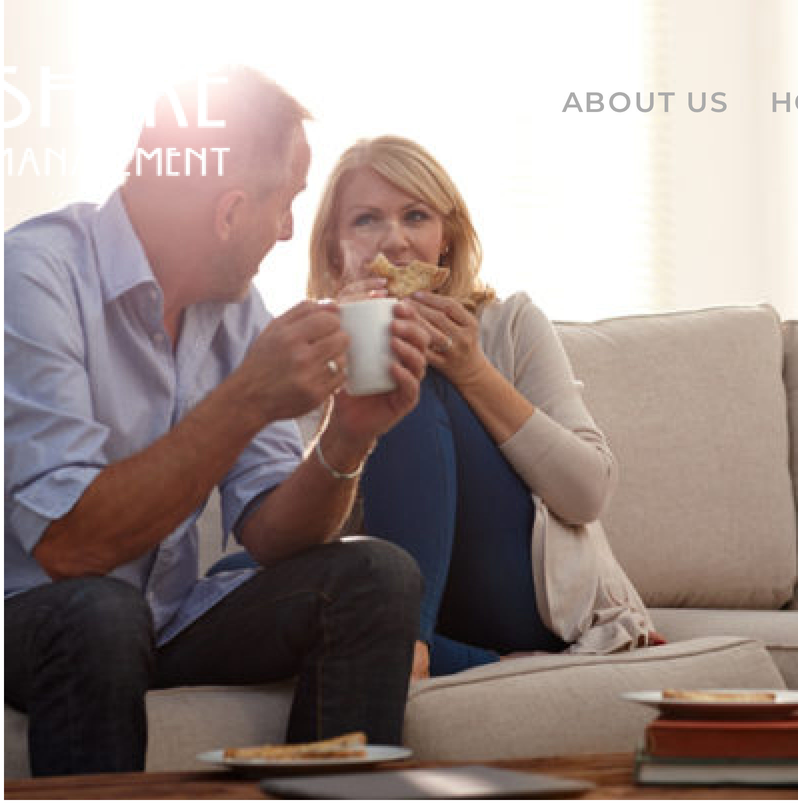


I'm looking for one-time advice.

LEARN MORE ABOUT WEALTH CHOICE

I'm seeking investment management.

LEARN MORE ABOUT WEALTH BUILDER



I need comprehensive wealth management.

LEARN MORE ABOUT WEALTH MANAGEMENT

Schedule a Complimentary Phone Call

To find out how our services can best fit your needs, schedule a complimentar
15-minute phone call today.

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PERSONAL FINANCIAL ADVISORS

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