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ABOUT US

Wallace Advisory Group is an independent advisory firm that works with highly successful individuals and businesses. We are purpose-driven, always beginning with the end in mind, and we design customized solutions aimed to meet our clients' needs. Importantly, we take responsibility for implementing and maintaining our clients' plans over time. As a result, our clients have a clear roadmap and can move forward with clarity and confidence.

Wallace Advisory Group is a true family practice, led by Bill Wallace and his sons Craig & Joe Wallace. We build long-term relationships with our clients and their families. With over 40 years of financial services experience, you can trust us to put in place the right solutions that will help you to navigate the increasingly complex world and reach your goals.

OUR SERVICES



Lifetime
Planning



Investment
Management



Estate
Planning



Business
Planning

Our team of professionals has helped our clients achieve their financial aspirations.

How can we help you?

CONTACT US

DISCLAIMER

Wallace Financial & Insurance Solutions, LLC. dba Wallace Advisory Group and their registered representatives are currently licensed to sell variable life and annuity products, as well as other securities products, in the states of CA, TX, HI, NV, and AZ. Residents of other states should consult with a local registered representative for securities products.

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