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Creative Capital Management Investments LLC (CCMI) is a [fee-only advisory firm](#) based in San Diego that specializes in providing highly personalized and proactive financial planning and investment management services to business owners, professionals, individuals and families. Always putting our clients' interests first, our trusted team of [Certified Financial PlannerTM professionals](#) has helped to enhance our clients' financial peace of mind for more than 40 years. How can we help you?

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CCMI can help you find a comfortable balance between planning for your family's long-term financial well being and enjoying living in the present.

[**Financial Planning**](#)

CCMI can help you understand what your money needs to do for you and then design and manage a portfolio customized for your circumstances.

[**Investment Management**](#)

CCMI can help you plan for success if you are starting a family or a new career, buying your first home, paying off loans, or investing for the first time.

[**First Step Financial Plan**](#)

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