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Matthew A. Kasa Investment Advisor Representative



Where Service is First

Selecting a Financial Advisor in Orange County, California is a very personal decision. We suggest that you call for a complimentary evaluation. You can decide if we will provide an environment that meets your personal needs.



HOW CAN WE HELP YOU?

Matthew A. Kasa, Investment Advisor Representative, provides wealth management solutions and services to individuals, families, and businesses. We help our clients implement financial strategies designed to help them accumulate, manage, and protect their wealth and pursue their most important financial goals. The ultimate goal we have for you is confidence in your investments.

People choose to work with a financial advisor for various reasons. Our firm's strengths are our independence and experience. Our mission is to provide advice that proves to be valuable, and personal service with attention to details.

WE OFFER CHOICES:

If you are looking for advice or planning only, we can provide those services for an hourly rate or for a pre-determined flat fee.

If you are looking to purchase investments, annuities, or insurance without the need of continuous management we can offer securities of almost any type or shop numerous carriers for annuities or insurance products tailored to your needs on a commission only basis.

If you need continuous monitoring, planning, and investment management we offer comprehensive ongoing advisory services for a reasonable asset management fee.

All of our fees or commission arrangements are fully disclosed in our Form ADV Part II document given to you at our first meeting and offered annually thereafter.

Most of our new business comes from referrals and from repeat customers. Most of our customers strive to obtain a “growth with safety” long-term financial scenario. We try to make sure that our clients get the right amount of safety for now and the right amount of safety for later. There is a risk/reward tradeoff that we make sure our clients understand and take advantage of.

Most importantly, our clients will receive consistent advice, planning and service. Our advice and services are often coordinated with that received from the clients legal and tax advisors with the goal of creating a satisfying, long-term relationship founded on professionalism, communication, and trust.

Step One in our process is a face-to-face meeting to review your situation and understand you and your needs. There is no charge for this initial meeting. We then mutually determine if we should proceed to work together and move on to the next steps.

Step Two is a detailed analysis of your goals and situation and the alternative strategies available.

Step Three is the implementation of the selected strategy to meet your goals.

Step Four is monitoring your progress and making adjustments as needed to meet changing needs or conditions.

Call us today to schedule an appointment at 949-200-8204.

Again, the ultimate goal we have for you is confidence in your investments.

Some of the cities we serve in Southern California are LA , Hollywood, Los Angeles, Long Beach, Seal Beach, Redondo Beach, Newport Coast, Manhattan Beach, El Segundo, Marina Del Rey, Malibu, Palos Verdes, Reseda, Pasadena, Arcadia, San Marino, Monrovia, Glendale, Burbank, Santa Monica, Brentwood, Beverly Hills, Hollywood Hills, North Hollywood, Studio City, Encino, Foothill Ranch, Tarzana, Orange County, California, OC, CA, and it's cities of Anaheim, Orange, Buena Park, Brea, Cypress, Huntington Beach, Corona Del Mar, Laguna Beach, Dana Point, Garden Grove, Fullerton, Orange, Tustin, Fountain Valley, Costa Mesa, Newport Beach, Seal Beach, Los Alamitos, Irvine, Laguna, Laguna Niguel, Mission Viejo, Ladera Ranch, Cota De Caza, Villa Park, Rancho Mission Viejo, Orange Park Acres, Yorba Linda, Placentia, Brea, Santa Ana, San Clemente, San Juan Capistrano, Rancho Santa Margarita, Tustin, San Diego County, Del Mar, La Jolla, Westminster, Stanton, Covina, Shady Canyon, West Covina, Pasadena, Santa Monica, Beverly Hills, Palos Verdes, Malibu, Palm Springs, San Diego, Rancho Mirage, Indian Wells, Thousand Palms, Moreno Valley, Claremont, Montclair, Coto de Caza, Riverside, Ontario, Upland, Cucamonga, Redlands, Corona, Trabuco Canyon and the surrounding areas.

Matthew A. Kasa is securities licensed in California, Arizona, Nevada, Idaho, Texas, Oregon, and Maine. Insurance licensed in California (CA Insurance License 0E76802), and Arizona. Services are available only in jurisdictions where licensed to do business.



Securities and Investment Advisory Services offered through Woodbury Financial Services, Inc., Member [FINRA](#), [SIPC](#), and Registered Investment Adviser, PO Box 64284, St. Paul, MN 55164 (800) 800-2638.

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