

WOODBURY FINANCIAL SERVICES

Financial Advisor with a Foundation of Integrity, Honesty and Professionalism

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[f=q&hl=en&geocode=&q=3070+Bristol+Ave.+Suite+500,+Costa+Mesa,+CA,+92626+USA&ie=UTF8&z=16&iwloc=addr&om=1](http://www.google.com/maps?f=q&hl=en&geocode=&q=3070+Bristol+Ave.+Suite+500,+Costa+Mesa,+CA,+92626+USA&ie=UTF8&z=16&iwloc=addr&om=1)).



Are You Looking For a Financial Advisor in Orange County, California?

Today's investment climate offers unprecedented opportunities. At Woodbury Financial Services, Inc., the mission is to help people take advantage of those opportunities by providing them with three key tools:

- 1. A clear understanding of their financial goals***
- 2. A well-defined strategy for achieving those goals***
- 3. Ongoing service to track our clients progress***

You will find many financial advisor's in Orange County, but my services cover many areas of financial management, from investment and retirement planning to risk management and estate conservation. I specialize in helping my clients develop a comprehensive, cohesive financial strategy that fits their unique needs and enables them to meet both short- and long-term objectives. I can advise you on 401k / IRA rollovers, retirement income planning, life insurance and college education plans.

To help you understand what my free consultation entails, below is the six step process that I follow to customize a financial strategy for my clients:

Step 1: This is the most important step in the process. We get together and find out your personal financial goals for the future. If I don't know where you want to go and where you want to be in the future I cannot help you navigate and build a financial road map.

Step 2: Gathering financial data on the client's current financial situation.

Step 3: Analyzing the financial data and the goals of the client.

Step 4: Constructing a financial roadmap using different strategies that will suit the client's personal situation and needs.

Step 5: Implementing the strategies to get my client on the right path to financial success.

Step 6: Monitor and review the progress to make sure you stay on track and stay focused on your future goals. Depending on you preference we can meet quarterly, semi-annually or annually to review and update your situation. It is very important to me to stay updated on your situation because as your situation changes, your goals can change.

Selecting a Financial Advisor in Orange County, California is a very personal decision. I suggest that you call or email me for a free consultation and evaluation. The consultation is free and there is no obligation whatsoever. It is important for you to find an Financial Advisor that you feel comfortable with and have some chemistry with.

Please use my website to read up on educational articles that outline financial concepts and highlight products designed to fill the gaps in your financial strategy. You'll also find different financial calculators that will help you assess your current and future needs. Please remember to visit my Web site often, as the content is constantly changing.

Check the background (<http://brokercheck.finra.org/>) of this financial professional on FINRA's **BrokerCheck** (<http://brokercheck.finra.org/>).