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SF Business Times ranks Capital Advantage in the Top 50

LARGEST BAY AREA WEALTH MANAGEMENT FIRMS

Ranked by Bay Area assets under management for individual clients. Capital Advantage has surpassed \$700 million in assets under management, cementing its spot as the largest wealth management firm in Lamorinda and in the Top 50 in the entire Bay Area.*

*Wealth management firm is defined as a locally-headquartered, independently-owned fee-only advisory firm that provides both financial planning and investment management services. SF Business Times Top 50, 5-4-18.

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OVER 35 YEARS OF EXI*

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goals. We provide personaliz
expertise that comes with de

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EXPLORE OUR SERVICES

[INVESTMENT MANAGEMENT \(/SERVICES/#INVESTMENT-MANAGEMENT\)](/SERVICES/#INVESTMENT-MANAGEMENT)

We are dedicated to helping you implement a personalized, reduced-risk investment strategy designed to make the most of your wealth.

[FINANCIAL PLANNING \(/SERVICES/#FINANCIAL-PLANNING\)](/SERVICES/#FINANCIAL-PLANNING)

Our planning process looks beyond the numbers to get a clear understanding of your financial needs, goals and desired results.



PERSONALIZED SERVICING (/TEAM/#OUR-APPROACH)


We are committed to providing you with outstanding service. You have high expectations, and we are dedicated to exceeding them.



RETIREMENT PLANNING (/SERVICES/#RETIREMENT-PLANNING)

Our advisors will help you craft a plan designed to balance your immediate financial concerns with your dreams for the future.

We'd love to start a conversation with you. Call or request an appointment today.

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