



☎ 805-446-4601



## Professional Planning

Helping clients achieve their financial goals since 1970

You have financial goals - short and long term.

You want to retire comfortably and not outlive your money.

You want professional help managing and growing your savings and financial assets.

You want an experienced financial advisor who cares about you, your concerns and your dreams.

Professional Planning is dedicated to help with your financial planning, retirement planning, long term capital preservation and wealth management of your investment portfolios.



## **Our Team**

Years of experience have prepared us to guide you through your life transitions.

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## **Wealth Management**

Trust. Honesty. Integrity. We believe values matter, and we live by ours every day.

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## **Our Process**

We create strategies that are tailored to your needs and goals.

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## **Understanding Today's Financial Environment**

We can help take the mystery out of preparing for today and tomorrow. Whether you are investing to build wealth, protect your family, or preserve your assets, our personalized service focuses your needs, wants, and long-term goals.

Our team of professionals have years of experience in financial services. We can help you address your needs of today and for many years to come. We look forward to working with you.

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## Your Financial Future

Today's economic environment presents many challenges. But along with these challenges comes opportunities and potential rewards for those who can identify long-term trends.

Whether you're facing retirement—or looking to better understand certain investment ideas—we can help you address your most pressing financial questions.

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*"Remember, what does 'retirement' mean? It doesn't mean that you're a couch potato. Leisure is not the same things as rest. If you're bicycling five miles a day, that's leisure, but it certainly takes a lot of effort."*

**Robert Fogel**

## Have a Question?

Name

Email

Message

**SEND**

### Contact

Professional Planning

Office: 805-446-4601

Fax: 805-446-1199

100 East Thousand Oaks Boulevard

Suite 150

Thousand Oaks, CA 91360

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