



☎ (805) 497-1717

High Trust. High Touch. High Integrity.

Winters Financial Group is a full-service financial advisory group based in Thousand Oaks, CA. Our mission is to help clients grow and protect their wealth by providing comprehensive strategic planning combined with a personal approach.

About Us



Experienced Leadership

Financial freedom comes from knowledge, awareness, and an experienced hand leading the way. At Winters Financial Group, we can help guide you in achieving both your long- and short-term goals. We've been advising and leading our clients toward their financial goals for more than 20 years—and now it's your turn.



Knowledgeable Planning

Our company is based on the principle that education and understanding of your current financial situation is vital. In order to successfully make prudent decisions concerning your future, you need to have all the facts, figures and know the trajectory of your future. That's where we come in!



Collaboration & Commitment

Planning needs constant attention. Our programs are designed to help grow and conserve your wealth, while delivering personalized service. By maintaining ongoing personal contact, we help you pinpoint your financial goals and make recommendations along the way that fit your unique circumstances.





Global Approach

Your life is not “one size fits all” and we do not just look at one area of your financial situation. Using a global perspective combined with a personal approach, we assess your bigger picture to develop a program that is personal and effective while providing confidence and self-assurance.

Rick Winters

Rick Winters brings a well-rounded balance of financial education and strategy to the table. He takes pride and finds passion in helping clients to identify and achieve their lifelong dreams.

Rick began his career with a degree in Real Estate and Finance from California State University, Northridge. Over the next decade, he became a partner in two mortgage brokerage firms, funding over half a billion dollars in residential loans. In order to better serve the needs of his clients, Rick took and passed the series 7, series 63, series 65 and Insurance designation tests, which allows him to counsel clients and offer smart program choices for long-term financial strategies.



Outside the office, Rick is a family man and integral part of his community. He coached soccer and baseball for local youth sports and volunteered regularly at the Los Angeles Mission. To demonstrate his commitment to his community, he joined the Conejo Las Virgenes Future Foundation in 2000 and served as an Executive Board member. Rick also founded and hosts the Coats for Casa Pacifica charity event, which is an annual clothing drive that benefits children in need of warmth and confidence. Come check out this awesome event every year in January!

We look forward to hearing from you.

Name

Email

Phone

Question

SEND

Contact

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