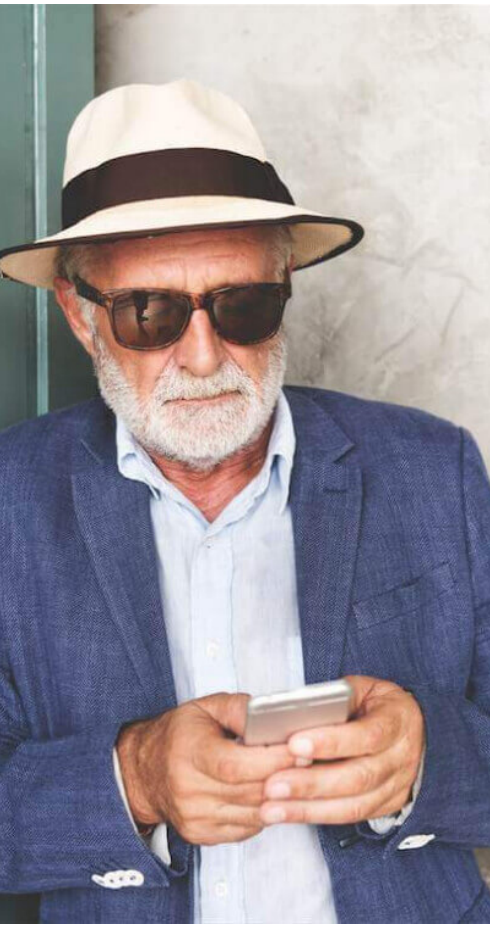
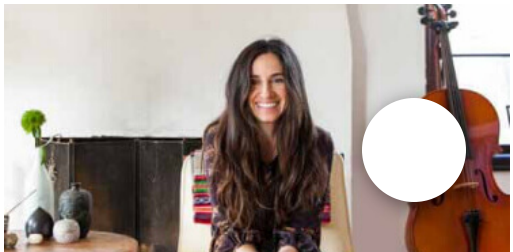


All walks of wealth.

Are you ready for an investment and financial growth strategy that's as unique as you are?





At B|O|S, we've developed a powerfully personal, transparent approach to financial planning and wealth management.

We provide our clients with an array of financial services, including personal wealth management, customized financial planning, trust and estate planning, institutional investment strategies for attorneys, and all points in between. Since each client's unique life and financial history requires its own roadmap, we custom-build a plan for every single client, designed specifically for their individual trajectory. We're proud to have been in business for over 30 years and over those years we've developed some of the most experienced, comprehensive and technically sophisticated capabilities in our industry.

A Double-Edged Sword

posted May 22nd, by Jeffrey D. Lancaster, CFP®

At a business conference a couple of years ago, the speaker got things going with a joke, as is often the case at such events. “If Amazon is going into your line of business,” she said, “then you should sell now. And if Amazon is not going into your line of business, then your business […]… CONTINUE READING

Quid, Me Anxius Sum?

posted May 22nd, by Dave Campbell, CFA

Switching Jobs, Switching Your Retirement Savings Strategy

posted May 22nd, by Michelle Soto, CFP®, CDFA™

VIEW THE BLOG

The Team

Our principals, portfolio managers, and the administrative support teams are exceptionally qualified to serve our clients. With prestigious educational degrees, industry certifications and professional honors, we're frequently quoted in top national and local financial publications, and consistently recognized by many of those publications as being in their top tier of wealth managers.

GET TO KNOW US

B|O|S Recognition

advisor space. These accolades and peer recognitions reflect not only our passion, but also our deep commitment to every aspect of our relationship with our clients.

+ VIEW ALL AWARDS

SUBSCRIBE TO OUR NEWSLETTER

Get B|O|S Perspectives in Your Inbox

First Name

Last Name

Email

SUBSCRIBE

SAN FRANCISCO

345 California St
Suite 1100
San Francisco, CA 94104

SILICON VALLEY

203 Redwood Shores Pkwy
Suite 510
Redwood City, CA 94065

(650) 462-8666

About Us

Our Promise

Our Team

Awards & Accolades

Community

BOS Foundation

Access Your Fund

BOS Compass

Careers

Approach

Overview

How We Plan

Services

Customized Financial Planning

Personal Wealth Management

Trust & Estate Planning

Institutional Strategies

For Attorneys

Resources

Blog

White Papers

Quarterly Summaries

Client Tax Information

Podcasts