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REGISTERED INVESTMENT ADVISOR

Insight... Integrity... Experience...
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Investment Management

Manage your risk while
you build long-term wealth

We take the time to understand your ability to assume risk and translate this into an investment portfolio that can reach your financial goals.



(<https://marinwealthadvisors.com/financial-planning/>)

Financial Planning

Develop your roadmap
to financial security



to financial security

Marin Wealth Advisors LLC

We help you create a comprehensive and flexible plan that sets you on a path to achieving your financial goals when you're saving for a home, children's education, retirement, or all three. [\(https://marinwealthadvisors.com/\)](https://marinwealthadvisors.com/)



[\(https://marinwealthadvisors.com/retirement-planning/\)](https://marinwealthadvisors.com/retirement-planning/)

Retirement Focus

Determine the right
retirement investments

We can help you with your investment choices in your employer's 401k, create a retirement plan for your business, and help you manage your investments to last you through retirement.



[\(https://marinwealthadvisors.com/financial-planning/stock-compensation-advisors/\)](https://marinwealthadvisors.com/financial-planning/stock-compensation-advisors/)

Stock Compensation

Maximize the value of your
well-deserved compensation

Get the guidance you need with the cash planning, tax implications and overall investment planning around your company stock plan.



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(<https://marinwealthadvisors.com/financial-planning/529-college-savings-plan/>)
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Education Planning

Understand the tax and growth benefits of a college savings plan

We'll help you with financial planning for your family's education needs and guide your investments.



Financial Coaching

Get your own family
financial coach

Get your own family financial coach. Although you may not have a lot to invest now, you will soon be making big financial decisions that will be a big part of your financial future, and you'll want us on your team.

MWA VIRTUAL ADVISOR

Experience the Convenience



EXPERIENCE THE CONVENIENCE

Now you can get professional investment advice online
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START YOUR TOUR (<https://marinwealthadvisors.com/>)
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Marin Wealth Advisors

Insight. Integrity. Experience.

Years of experience and exposure to multiple market cycles have taught us what works and what doesn't when it comes to investing. These insights help our clients in Marin County, the San Francisco Bay Area, and beyond optimize their returns while avoiding unnecessary risk. We also offer another financial advantage: low fees.

LEARN MORE (<https://marinwealthadvisors.com/about/>)

Our Philosophy

Every client, large or small, deserves honest and independent investment advice.

Investment management should be done by a Fiduciary.

Individual clients should pay no more than large institutions for investment management.

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Investment decisions should be driven by each client's investment goals and
(<https://marinwealthadvisors.com/>).

Family and Community – Part of My Retirement Plan

(<https://marinwealthadvisors.com/family-and-community-part-of-my-retirement-plan/>)

June 13, 2019

Several years ago, I began to volunteer at a local elementary school. My initial thought was to read “Cat in the Hat” and other similar books to kindergarteners once a month. However, it soon became apparent that there was an urgent need for me to work with kids who have learning disabilities or were in the foster care system. Working with these kids has made me aware of several critical needs in





(<https://marinwealthadvisors.com/stock-compensation-taxation/>)

Stock Compensation Taxation (<https://marinwealthadvisors.com/stock-compensation-taxation/>)

March 8, 2019

As the tax filing deadline approaches us again this year, I thought I'd write a quick summary of taxation of Stock Compensation. Each of the three types of stock compensation discussed below are taxed differently so it is important to be informed as to how each is treated by the tax code in order to avoid expensive mistakes. (Please remember that these are general concepts and that for any





(<https://marinwealthadvisors.com/2018-stock-market-review/>)

2018 Stock Market Review (<https://marinwealthadvisors.com/2018-stock-market-review/>)

February 28, 2019

After a long run, the US markets showed us in 2018 that they can go down. For the first time since 2008 the S&P 500 was down -4.38% for the year. What caused this is up for debate, but the word “uncertainty” was a key. Uncertainty about global growth, global trade, rising interest rates all weighted upon the market. Valuations were high coming into 2018, so companies needed to really post

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