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☎ (805) 695-2599

"**True Wealth** is not defined by commas or 'zeros' – it is characterized by the quality of relationships; pursuing your passions and living a purpose-driven life that is personally fulfilling."

- Alejandro J. Ochoa, CRPC<sup>®</sup>



## What does True Wealth mean to You?

Our mission is to help each of our clients define what True Wealth means to them, and to build a financial support system that helps them to pursue that goal.

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## True Values

True Values serve as our guiding principles for our business practices.

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## True Vision

Our Vision is to work as a team to help each client define what True Wealth means to them.

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## True Clients

True Clients span generations. From the Greatest Generation to Millennials, we offer services to help your family manage all your financial needs.

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## **Driven by *your* success.**

Our success is a direct reflection of the advice we provide our clients. For this reason, we listen intently, train vigorously and never take our business for granted. When a client is living exactly as he or she has envisioned, we know that we have provided them the opportunity to achieve True Wealth.

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## **True Talent**

True Wealth Management, Independent Advisor Alliance (IAA) and LPL Financial (LPL) are three separate and independent entities working together within a highly regulated framework that allows for the most independent, flexible, objective method of serving our clients' needs.



We work with our to help them understand what True Wealth means to them.

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LPL was founded with a pioneering vision: to help entrepreneurial financial advisors establish successful businesses through which they could offer independent financial guidance and advice.

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**Independent**  
**Advisor Alliance**

**BEING INDEPENDENT SHOULDN'T MEAN BEING ALONE**



Based in Charlotte, N.C., Independent Advisor Alliance (IAA) is strategically focused on building a community of successful independent advisors serving the financial and retirement needs of individuals and businesses.

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## Contact

True Wealth Management

Office: (805) 695-2599

Office: (818) 334-8246

Fax: (888) 322-3308

100 N. Hope Ave.

Suite 11

Santa Barbara, CA 93110

[info@mytruewealth.net](mailto:info@mytruewealth.net)



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