



Forward-looking, client-focused.

Jurika, Mills & Keifer combines a forward-looking view of the world with a deep understanding of our client's needs and aspirations to build and preserve wealth and financial well-being over time.

Based in the San Francisco Bay Area, we provide sophisticated wealth management, planning and advisory services to a limited number of individuals and families.

Over the years, we have built a reputation for independent thinking, sound judgement, and a high level of individualized advice and service.

We welcome the opportunity to serve you and invite you to learn [about our firm \(/firm/about\)](/firm/about).

Commentary and Perspective



Quarterly Investment Commentary – July 8, 2019

Glorious Summer

(</perspective/commentary/glorious-summer>)

The longest days of the year are already behind us. There is still plenty of summer left, but the daylight hours will start to fade at the edges as the ~~Earth~~ Earth completes the back half of its annual orbit around the sun.

[Read more \(/perspective/commentary/glorious-summer\)](/perspective/commentary/glorious-summer)



Quarterly Investment Commentary – April 5, 2019

Sky Fall? (</perspective/commentary/sky-fall>)

If you had listened to most of the economists and market strategists on television in the fourth quarter of 2018, you might have thought that the sky was falling, the Earth was about to stand still, and the zombie apocalypse had begun.

[Read more \(/perspective/commentary/sky-fall\)](/perspective/commentary/sky-fall)

Why Jurika, Mills & Keifer?

Experience

- A highly experienced team of seasoned investment professionals.
- Four decades of market perspective with responsibility for over \$7 billion in client assets at our prior firm.
- We think for ourselves and over the years have built a reputation for independent and forward-looking thinking.

A Differentiated Approach

- Fee-only and unconflicted: Our interests are aligned with those of our clients.
- Focused: We serve a limited number of individual and family client relationships. We grow almost exclusively through referrals and therefore spend the majority of our time serving our existing clients rather than gathering new ones.

A Better Experience

- A higher level of advice and service from seasoned professionals. Our clients are at the center of everything we do.
- Large firm experience with small firm focus and responsiveness.
- Financial “Peace of Mind.”

- Comprehensive planning and management: We work with clients to help them to see, organize and manage their “total financial picture.”
- Our clients deal directly with senior principals. We have no “relationship managers.”

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