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## San Diego's Leading Investment Advisory Firm

As San Diego's leading investment advisory firm, Wilsey Asset Management has built a reputation for effective investment management and expert financial guidance along with financial planning services nationwide. Our goal is to make our clients money and provide attractive returns on their investments transparently. We can help you create an [Individualized Concentrated Value Portfolio](#) which has the potential to help you reach your financial goals with the least amount of risk.

Find out more about our investment opportunities by attending our workshops or by contacting us today.

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**Saturdays 8-9am (LIVE)**  
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## Our common-sense approach to investing

It's your money, and you've worked hard to earn it. That's why we take a common-sense, completely transparent approach to our investment strategies to ensure you have the peace of mind necessary to make the right financial decisions. We can help you in every aspect of your financial life, from individual and joint accounts to 401(K)s, education funds, retirement savings, IRAs and more. Don't let your years of effort go to waste, invest wisely when you invest with Wilsey Asset Management.

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Wilsey Asset Management was founded with the goal of assisting our clients in every aspect of their financial lives. We've provided the most personal service available, thus earning a reputation for excellence in our industry. For each of our clients we strive to help create financial stability and security to provide financial independence.

At Wilsey Asset Management, we provide financial assistance in the following areas:

#### **Investment Services:**

- Individual and joint savings
- Corporate accounts
- Trusts and foundations
- Education savings
- 401k and pension plans
- IRAs and more

#### **Financial Planning:**

Lasting wealth is not about income or bank accounts, it's about making the right decisions. One poor decision can be harmful, several can be disastrous. At Wilsey Asset Management, we offer financial planning to help clients make the right decisions at the right time to ensure their financial success.

Contact us today to find out how we can best serve you.

[Read more](#)



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Contact us

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