



A Fiercely Independent Fee-Only Financial Advisor in San Francisco

We work with individuals and small companies to implement effective investment management strategies and build assets over the long term. Our main fields of expertise are:

[Investment Management](#)

[Financial Planning](#)

[Retirement Plans for Small Businesses](#)

[DFA Funds](#)

Contact me and I can explain how we structure portfolios with the aim of outperforming the market.



Working with a financial advisor who is an expert on small business retirement planning will make your life easier, as your primary concern should be making your business thrive. We'll help ensure your 401(k) retirement plan is more efficient and less time-consuming.



Look through literature by the Nobel prize winners. Listen to Warren Buffet. The answers are clear: Low cost, broadly diversified passive investments will beat active management. We make use of only extremely low-cost, pure no-load passive investments to help you keep costs low and let your investments grow.



Planning your financial future may be a struggle, but having a defined financial plan allows you to better anticipate and be ready to tackle any difficulty and take advantage of any opportunity presented to you.

A Financial Advisor Can Help

Get a No-Risk Consultation with an Expert Financial Advisor in San Francisco, CA.

It's our pleasure to help you.

Contact Us
Today

DFA FUNDS



Dimensional Fund Advisor (DFA) is a unique fund complex. DFA chooses

MEET KEIR, YOUR FINANCIAL ADVISOR

Keir is a member of the American Society of Pension Actuaries, the Security Analysts of San Francisco and the Financial Planning Association. Keir is a Chartered Financial Analyst through the Association of

CERTIFIED FINANCIAL PLANNER



A Certified Financial Planner™ (CFP®) professional is accredited by the Certified Financial

overweight true value and micro cap as there is a statistically meaningful probability of such a strategy beating the market in the future.

Investment Management & Research (www.aimr.org) and a CFPTM through the Certified Financial Planning Board of Standards (www.cfp.net).

Planner Board of Standards as having demonstrated financial planning technical knowledge, experience, and adherence to a client-centered code of ethics.

YOUR BAY AREA FEE-ONLY FINANCIAL ADVISORS

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