



☎ (949) 336-7300

Let us bridge the gap toward securing your financial future

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Understanding Today's Financial Environment

WIN-TEAM is a Wealth Management Firm that strives to separate itself from other firms with its versatility in dealing with the needs of its clients with whatever financial decisions they are faced with. Clients do not get the expertise and service of an advisor when they come to WIN-TEAM; they get the collective attention of each

and every associate and staff member – a WINning TEAM to guide them through their retirement.

WIN-TEAM offers specially tailored services to each individual in preparing for their golden years through detailed investment and tax planning. All types of clients are welcomed with open arms, but WIN-TEAM prides itself in striving to aid the diligent blue-collar client who looks to achieve financial security after a lifetime of hard work. With our customized asset allocation strategies combined with choosing investment products of the highest regard, we believe we give our clients the greater peace of mind they seek in placing their livelihood with us.

Tax services are not affiliated with nor endorsed by First Allied Securities.

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We Are Here For You

Today's economic environment presents many challenges. But along with these challenges comes opportunities and potential rewards for those who can identify long-term trends.

Whether you're facing retirement—or looking to better understand certain investment ideas—we can help you address your most pressing financial questions.

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About Us

Our first priority is helping you take care of yourself and your family. We want to learn more about your personal situation, identify your dreams and goals, and understand your tolerance for risk. Long-term relationships that encourage open and honest communication have been the cornerstone of my foundation of success.

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Orchestrating Your Retirement Accounts

An orchestra is merely a collection of instruments, each creating a unique sound. It is only when a conductor leads them that they produce the beautiful music imagined by the composer.

The same can be said about your retirement strategy.

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Let's Talk

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SEND

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