

# *Bringing your finances and life goals into harmony.*

GET STARTED

Finding balance in your financial planning and investments is the key to creating harmony in your life's pursuits. Your dreams and aspirations, your commitments and obligations, and your legacy are all intertwined with your unique financial reality. Symphony Financial Planning provides the insights, guidance, and services needed to develop and sustain individualized financial plans and manage your wealth. Helping clients find financial balance and harmony is a hallmark of Symphony Financial Planning. Discover the advantages our dedicated team of financial experts can bring to your life's pursuits.

[LEARN MORE](#)

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## How We Help

We provide fee-only financial planning and investment management services to professionals in the public and private sectors throughout the Davis and Sacramento area.

### Orchestra

Comprehensive financial planning and wealth management, supported by an ongoing, long-term relationship

## Ensemble

Coming soon! Ongoing financial planning with a CERTIFIED FINANCIAL PLANNER™ professional to get you started and stay on the right path

## Duet

Hourly financial planning advice for guidance on the issues that matter most to you

## In the Community

Symphony Financial Planning is committed to supporting the Davis arts and education communities.  
See what we have been up to lately.

Operation Education Outreach Continues with Third Symphony Sponsorship

*March 3, 2019*

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Proud to Support the Davis Parents Nursery School as an Event Sponsor

*February 24, 2019*

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Symphony Is Supporting North Davis Elementary

*February 23, 2019*

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Fax: (530) 758-2115

Hours:

M-Th 8:30 AM – 5:00 PM

F 8:30 AM – 3:00 PM

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[About Us](#)

[How We Help](#)

[Who We Help](#)

[In the Community](#)

[Blog](#)

[Client Login](#)

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