MISSION WEALTH

YOUR PARTNER
IN BUSINESS

As a trusted, professional advisor, Mission Wealth treats your clients with the utmost care to deliver the highest value service possible.

For 20 years, we have abided by the golden rule: *"Treat others the way you want to be treated"*. As fiduciaries, advisors and clients trust we have their best interests in mind. We collaborate with you, their professional advisor, in helping our shared clients to achieve their goals.

AS PART OF OUR PROMISE TO YOU, WE WILL:

- Collaborate throughout our partnership
- Proactively communicate and inform
- Help facilitate joint client meetings
- Deliver peace of mind to both you and to our shared client

WE HAVE EXPERIENCE GUIDING CLIENTS THROUGH LIFE EVENTS AND TRANSITIONS, INCLUDING:

- Sale of a business or property
- Divorce
- Inheritance
- Retirement
- Loss of a spouse
- Health event

2021 BARRON'S Top 100 RIA Firms

Celebrating Over 2000 20 2022 Years in Business

Your goals. Our mission.

Over $4.8B Billion Assets Under Management	Over 2,100 Client Advisory Relationships	24 Offices Located Across the U.S.	100% Employee-Owned and Operated	83 Employees and Growing

RECENT CLIENT SUCCESS STORY

A divorce attorney referred a female client to a Mission Wealth advisor to **create a spending and cash flow analysis.**

- The attorney and her client wanted guidance on how to predict and budget the client's spending in the wake of her divorce settlement.
- The advisor worked with the client to compile her spending figures from bank accounts and credit cards to project future cash flow needs.
- The client owned $100 Million in a concentrated stock position of a software company.
- We worked closely with the client's CPA to devise a strategy to diversify the client's investment portfolio, manage taxes, and create an income stream to meet the client's cash flow needs.
- Working with the client's attorney, we set up and funded a Charitable Remainder Trust with $5 Million of the concentrated stock holding, further reducing the client's capital gains taxes and providing the client with an income tax deduction.
- Our collaborative partnership with the client and her trusted advisors resulted in the best solution for the client as she navigated the uncertainty of her divorce.