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:

- Retirement
- Sale of a business or property
- Divorce
- Loss of a spouse
- Inheritance
- 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 client referral couple **inherited a large amount of real estate** and wanted to better understand their **personal cash flow and income taxes**.

- After coordinating with the clients' advisors and tax professionals, we identified which real estate holders the client should sell and which real estate holdings the clients should continue to own.
- With the property sale proceeds, we diversified the clients' investment portfolio to include other investments, generating a high-income yield to meet their spending needs.
- Additionally, through our client discovery process, we uncovered the clients' desire for a portfolio that matched their values. We created a customized Socially Responsible portfolio that incorporated the clients' world views and charitable interests.