Business Connection

PLEASANTON CHAMBER of COMMERCE

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Business Spotlight

Pleasanton Wealth Management Team: Offering over 35 years of experience

Morgan Stanley

As a dedicated member of the Pleasanton community and proud member of the Chamber of Commerce, we have had the privilege of servicing our clients for over 35 years.

At the Bay Area Synergos Group, we bring a team approach with complementary skills to every client we advise. We create plans to help navigate the various stages of your life from asset accumulation through optimized distribution. Our comprehensive wealth management process includes your investments, of course, but goes far beyond to encompass estate planning, lending, cash flow management, philanthropy, and business transition strategies – in short, virtually every aspect of your financial life.

We strive to address your goals and offer financial solutions that are sustainable. Examples of common goals include retiring with confidence, leaving a meaningful legacy, financing a new home or other major acquisition, protecting your family from unexpected long-term care expenses, providing ongoing care for a special needs child, adapting financially to the loss of a spouse, investing in your children's college education, and executing various business goals including acquisition, sale, succession, and cash management.

We work closely with your attorney and accountant to develop a plan in concert, not at odds with each other. If you wish, we can introduce you to professionals with the experience to help you meet the specific challenges you face.

At the Bay Area Synergos Group, our investment process focuses on the long term while simultaneously preparing you for unforeseeable bumps along the way.

Our investment process focuses on the long term while simultaneously preparing you for unforeseeable bumps along the way. When creating your personal financial strategy, we strive to quantify the minimum amount of risk needed to achieve the highest level of success, identifying all resources available to achieve your goals. We utilize active tax management strategies to help reduce capital gains and minimize your obligations come tax season.

Synergos denotes the human interaction necessary to work collaboratively toward a common goal. We welcome the opportunity to schedule a complimentary meeting to review your current investment strategy. To deepen our relationship and address any concerns or goals that are top of mind, contact us at (925) 730-3872.