

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 col-

laboratively 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.

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Pleasanton 2025 Forum: Open to All

The Pleasanton Chamber of Commerce exists to grow the economic prosperity of our community. We are a membership-based, non-profit organization focused on helping our local businesses thrive. We offer numerous benefits including networking opportunities; marketing resources to grow the visibility of your brand; promotional opportunities to advertise your products or services; and broad representation of the Pleasanton business community to public officials.

As an advocate for business, the Chamber hosts regular meetings that focus on specific topics of importance to local businesses and the community. One of these meetings is the Pleasanton 2025 Forum. The purpose of the Forum is to gain a greater understanding of issues identified by the Chamber in our "Pleasanton 2025: A Community Vision" document, receive feedback from attendees, and advance

our knowledge of the topics.

I'd like to invite you to attend our next Pleasanton 2025 Forum meeting, which will be on Wednesday, March 8 from 12:00 to 1:00 p.m. It is open to everyone in the community, is free, and is held as a hybrid meeting in-person at the Chamber (777 Peters Avenue, Pleasanton) or on Zoom (register for link at pleasanton.org).

This upcoming Pleasanton 2025 Forum meeting will feature two guest speakers. The first will be new City Council member Jeff Nibert, who will talk about his vision and priorities as a councilmember for Pleasanton. This is a fantastic opportunity to learn more about Jeff and to ask questions. The second will be Experian's Adam Taplinger, who comes to us courtesy of a partnership with the U.S. Chamber of Commerce. He'll give a presentation on the Employee Retention Credit (ERC) and help attendees better understand if they qualify. The ERC

is a refundable tax credit to help businesses with the cost of keeping staff employed. Adam will help you better understand if you are eligible to receive the credit, and what steps are next.

The Pleasanton 2025 Forums are just one example of how the Chamber works. We believe our members and our community should be familiar with their council representatives. We also believe businesses should be aware of all the financial tools and resources available. We organized this meeting to cover these topics and provide you with an opportunity to connect with important information and important people.

Would you like to learn more about the local business community or get involved with growing our local economy? If so, we would love to talk with you. The Pleasanton Chamber of Commerce is here to help our business community thrive and improve the quality of life for all who live and work in Pleasanton. Email me at james@pleasanton.org or visit us online at www.pleasanton.org.

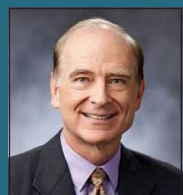


Second Wednesday of the
odd-numbered months, 12 noon

PLEASANTON 2025 FORUM

"Our strong local economy and extraordinary quality of life happen by design, not by accident. Working together, we cause great things to happen."

Open to everyone.
Forums held in a hybrid format.
In person at the Chamber or virtually via Zoom.
777 Peters Avenue, Pleasanton
www.pleasanton.org



Jeff Nibert

Pleasanton 2025 Forum Meeting

Wednesday, March 8, 2023

12:00 p.m. at the Pleasanton Chamber

Guest speakers

Jeff Nibert, Pleasanton City Council Member • Adam Taplinger, Experian



Adam Taplinger