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Forbes®



2009 LEADING PROVIDERS

Wealth Managers

OF SOUTHERN CALIFORNIA

**THE PROVIDERS SELECTED
MEET OR EXCEED THE
CRITERIA BELOW**

- Fee-Only or Fee-Based RIA or IAR
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- Comprehensive Range of Wealth Management & Financial Planning Services Offered
- 15+ Years of Industry Experience

Spectrum Asset Management, Inc.

1301 Dove Street, Suite 970
Newport Beach, CA 92660
949-717-3400 || www.myspectrum.com

Assists successful individuals and families to achieve and maintain financial well-being by developing a clear Values Filter™ through which wealth and portfolio decisions can be made with confidence.

Tellone Management Group, Inc.

6200 East Canyon Rim Road, Suite 201
Anaheim Hills, CA 92807
714-998-2290 || www.tellone.com

For over 30 years Tellone wealth managers have provided outstanding personal service & offer comprehensive financial, tax & estate planning, specializing in active investment management for individuals, trusts, IRA's and pensions.

Reilly Financial Advisors, LLC

7777 Alvarado Road, Suite 116
La Mesa, CA 91941
800-682-3237 || www.rfadvisors.com

RFA is an independent provider of professional investment management services and comprehensive financial solutions with special expertise in retirement planning and expatriate needs.

Merrithew & Thorsten, Inc.

9820 Willow Creek Road #200
San Diego, CA 92131
858-547-1845 || fee-only-planner.com

Merrithew & Thorsten, Inc. is a personal financial advisory firm dedicated to providing comprehensive financial planning to middle America on a fee-only basis.

Puplava Financial Services, Inc.

REGISTERED INVESTMENT ADVISOR

10809 Thornmint Road, 2nd Floor
San Diego, CA 92127
888-486-3939 || www.puplava.com

Since 1985 PFS's core values of personal attention, communication and education have provided exceptional asset management and informational resources to discerning investors.

Pence Wealth Management

5000 Birch Street, Suite 7600
Newport Beach, CA 92660
949-660-8777 || www.PenceWealthManagement.com

Pence Wealth Management helps grow and preserve clients' wealth through customized comprehensive financial planning using the broadest array of investment options delivered through unprecedented personalized service.

Crosswind Strategies

3655 Nobel Drive, Suite 350
San Diego, CA 92122
858-453-5100 || www.crosswindstrategies.com

Helps owners increase value of their businesses and use the wealth to provide family security in a tax-efficient way. Provides business, family and real estate advice with equal competence, making them unique in the industry.

Marathon Investment Programs

REGISTERED INVESTMENT ADVISOR

902 El Rancho Road
Santa Barbara, CA 93108
805-969-9646 || www.marathonip.com

With a long history of protecting their clients against large losses, Marathon is respected for generating consistent and superior returns, regardless of market direction.

Vaughn Woods Financial Group

2226 Avenida de la Playa, Suite A
La Jolla, CA 92037

858-454-6900 || www.vaughnwoods.com

VWFG's core competency is portfolio management. Portfolios are monitored and managed every day, in-house, focusing on neuroeconomics to enhance portfolio performance and capital preservation.

SECURITIES OFFERED THROUGH DELTA EQUITY SERVICES CORPORATION. ADVISORY SERVICES OFFERED THROUGH DELTA GLOBAL ASSET MANAGEMENT, A REGISTERED INVESTMENT ADVISOR. MEMBER FINRA, SIPC.

Lido Advisors, Inc.

9100 Wilshire Boulevard, Suite 350W
Beverly Hills, CA 90212
310-278-8232 || www.lidoadvisors.com

Lido has built its reputation by offering clients conflict-free advice and long-term investment plans that focus on wealth preservation, spending & income strategies for high net worth individuals, families and non-profit organizations

 Second Year Selected

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