

BUILDING A FOUNDATION FOR YOUR FINANCIAL SUCCESS



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BUILDING A FOUNDATION FOR YOUR FINANCIAL SUCCESS

Parkshore Wealth Management is a family-owned, independent, fee-only Registered Investment Advisor based in Roseville, California. We help our clients build a firm financial foundation for their lives, using tools and techniques that will position them to construct the future they want.

For more than three decades, we've helped people manage their investments and taxes. Today, we offer our clients a comprehensive array of financial services, so they can get answers to their financial questions, engineer solutions to their problems and move forward with confidence.

Who We Can Help

The key quality our clients share is a commitment to making smart financial choices for themselves and their family. They are eager to take positive steps that will allow them to strengthen their financial house and use their money to design the life they desire.

As advisors, our goal is to look at all the different wealth issues you face in coordination, so that we can construct a complete financial blueprint for your life. We help our clients:

- Create a steady stream of income in retirement
- Pay less in taxes
- Choose investments that allow them to save more
- Combat inflation
- Preserve their hard-earned wealth
- Craft a plan to provide for their children, grandchildren or favorite charities
- Develop a long-term saving strategy
- Pick investments that fit with the level of risk with which they're comfortable
- Build lasting financial stability

We believe flexibility and patience are key attributes of successful investors, and we enjoy working with people who have these traits. For those who are committed to embracing a long-term plan to manage their wealth, we offer our experience and knowledge as a resource.

**LET US HELP YOU BUILD A SOLID
FINANCIAL FUTURE TODAY.**



At Parkshore Wealth Management, we think of ourselves as the architects of your financial future. Our job is to take the various pieces of your financial life and put them together in a way that works for you. We invest our time and knowledge so that we can construct a financial plan that benefits you over the long term.

We begin by analyzing the details of your situation to uncover both problems and opportunities. In some cases, that means discovering ways to save money on taxes by adjusting your investment strategy. In other cases, we realize that a client could improve their situation by shifting their investment choices. Since each client is different, each needs a customized solution. Our experienced team of advisors is able to envision a cohesive strategy for your finances and then implement that strategy.

HOW WE WORK

“Get in the habit of analysis—analysis will in time enable synthesis to become your habit of mind.”

— Frank Lloyd Wright



Parkshore's Blueprint for Success



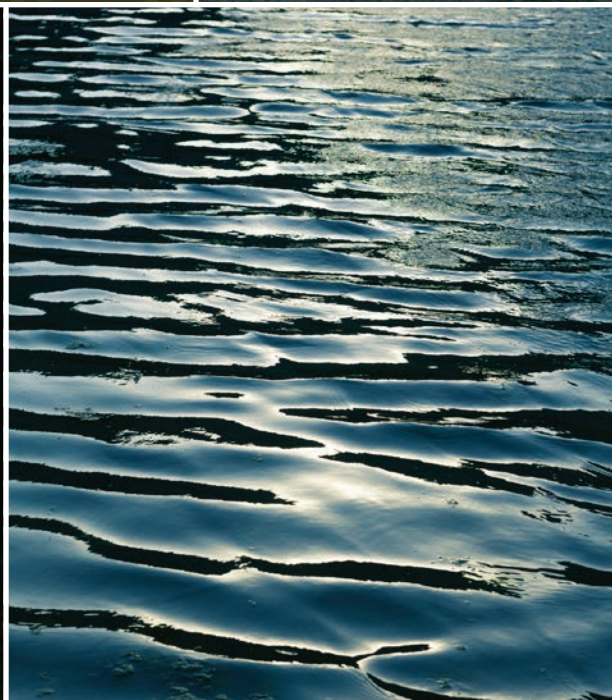
THE PARKSHORE DIFFERENCE

At Parkshore, we've designed a business that stands out from other advisory firms.

We are proud to distinguish ourselves by being:

Fee-only advisors: To get the most from your money, you need help from a professional who puts your needs first. We're fee-only advisors, which allows us to do exactly that. Instead of earning commissions for selling investments or products, you pay us directly for our advice. That means that we're only successful when you're successful.

Efficient: We put efficiency first when we designed our firm. Being efficient allows us to provide the services you need quickly and without hassle, which leaves you free to focus on building a meaningful life.



Experienced: You want to work with an advisor who understands your specific concerns. At Parkshore Wealth Management, we've dedicated our professional lives to the field of personal wealth management. With our collective knowledge, we're able to engineer the best strategies for building your financial future.

Tech-savvy: Technology offers us so many new opportunities to better manage your investments and deliver the information about your wealth in an easy-to-understand way. When appropriate, we implement new tools and technology that help us better serve you.

A multi-generational firm: We take pride in being a multi-generational, family-owned business. We built our business to last, so that we'll be able to care for you, and your family, both now and in the future.

Tax planning professionals: We don't think you can separate managing your finances from managing your taxes, since paying excessive taxes can limit your ability to save enough to reach your goals. Our experience in tax planning helps you construct a foundation that allows you to make your money work harder for you.



“Being efficient allows us to provide the services you need quickly and without hassle, which leaves you free to focus on building a meaningful life.”



SERVICES

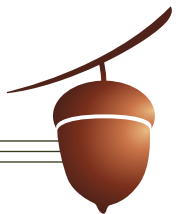
- Personal financial planning
- Tax planning and preparation
- Cash flow planning and management
- Investment policy statements
- Retirement, tax and estate planning strategies
- Building asset allocation models
- Disciplined portfolio management
- Retirement plan rollover guidance
- Advice about stock options
- Second opinion on your current investment portfolio or financial plan
- Resources on many other financial subjects to promote financial wellness

WHAT WE CAN DO FOR YOU

We specialize in designing straightforward solutions for our clients' complex financial problems. Often, clients come to us with a disorganized financial situation, where the different pieces aren't coordinated or working together in a way that helps them reach their goals. It's not unlike having an unreliable car—it may work some of the time, but there's a good chance it's not going to get you to where you want to go.

Just like you'd take that unreliable car to a mechanic, you need an expert to look at your finances and determine how to make them work better. Our team can take a poorly functioning financial machine and break it down into its various pieces, analyzing the different parts and then rebuilding from the ground up to create an efficient, smoothly functioning plan.

This in-depth approach allows us to engineer your financial situation so that you can move forward with clarity and confidence. Our ultimate goal is to look at all the different wealth issues you face in coordination, so that we can construct a complete financial blueprint for your life.





HAROLD C. ANDERSON, CFP®

Harold C. Anderson, the President of Parkshore Wealth Management, has been an advisor to individuals and business owners since 1978. He believes in developing long-term relationships with professionals and individuals based on honesty and integrity. Harold works with clients to understand their comprehensive needs and objectives, and then implements a strategic academic approach using sound financial principles to achieve a well-balanced, customized financial plan.

Harold is a CERTIFIED FINANCIAL PLANNER™ professional and a founding member of the Financial Planning Association of Northern California. He is also a member of NAPFA (National Association of Personal Financial Advisors). Harold graduated from Brigham Young University, where he earned a Bachelor of Science in business management with an emphasis in both financial and estate planning, as well as minors in accounting and economics.

Education

- Bachelor of Science in Business Management, Brigham Young University

Certifications & Designations

- CERTIFIED FINANCIAL PLANNER™ Professional
- California Tax Education Council (CTEC)-Registered Tax Preparer

Memberships & Affiliations

- Financial Planning Association of Northern California, Founding Member
- National Association of Personal Financial Advisors (NAPFA)

DANIEL C. ANDERSEN, CFP®

Daniel C. Andersen is the Vice President of Parkshore Wealth Management. He is a CERTIFIED FINANCIAL PLANNER™ professional and an active member of the Financial Planning Association of Northern California.

Daniel earned a Bachelor of Science in economics with a minor in business management from Brigham Young University-Idaho. He also has a Certificate in Personal Financial Planning from UC Davis Extension and is a CTEC-registered tax preparer in the state of California, as well as a California state notary.

Education

- Bachelor of Science in Economics, Brigham Young University-Idaho
- Certificate in Personal Financial Planning, UC Davis Extension

Certifications & Designations

- CERTIFIED FINANCIAL PLANNER™ Professional
- California Tax Education Council (CTEC)-Registered Tax Preparer
- California State Notary

Memberships & Affiliations

- Financial Planning Association of Northern California
- Treasurer for the Sacramento Chapter of the Financial Planning Association



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