vista®

You define success, together we achieve it.

“Wealth is the ability to fully experience life.”

Henry David Thoreau’s broad definition of wealth reflects our commitment to our clients: It’s not just about your money, it’s about you. By working to understand your perspective, passions and aspirations, we can develop the most effective wealth plan.

YOUR LIFE, YOUR LEGACY, A ROAD MAP FOR YOUR JOURNEY

You don't choose a financial advisor casually. You entrust them with significant responsibility to protect your assets and help them grow. That's a challenge in the best of economic times, but demands real discipline and experience when the financial universe turns and markets lose their luster.

Vista Wealth Management has that discipline and experience. With many financially successful clients and a track record of proven strategies, we bring a unique dedication to the discipline of wealth management.

At Vista, we only begin advising you on how to invest your assets and manage your wealth once we get to know you. We need to understand your values, goals, family dynamics, assets, liabilities, spending habits, tax situation and the legacy you wish to leave behind.

This is not easy work, but necessary in order to construct a comprehensive and complete plan that is built for you (and your family). Without going through this comprehensive process of discovery, we cannot imagine how to responsibly advise you on investing your assets and the other important areas of personal finance.

THE RESOURCES YOU EXPECT, THE COMMITMENT YOU DESERVE

Wealth management isn't just about your investment portfolio, it's about all of your family's assets and liabilities both present and future. It's about your relationship with a dedicated team of professionals, working together to help you achieve your goals.

At Vista, the key to that relationship is what we call your Family CFO. Your Family CFO is the hub through which you access the expertise and continuity you need throughout your financial life, to ensure that your plan is cohesive, comprehensive and coordinated.

Your Family CFO is committed to you—and committed to helping you achieve the financial peace of mind you deserve. With our dedicated, client-first culture, your Family CFO provides advanced planning, seamless integration, and personalized relationship management that assures an objective strategy and disciplined execution.

VISTA CLIENTS ENJOY THE FOLLOWING SERVICES:

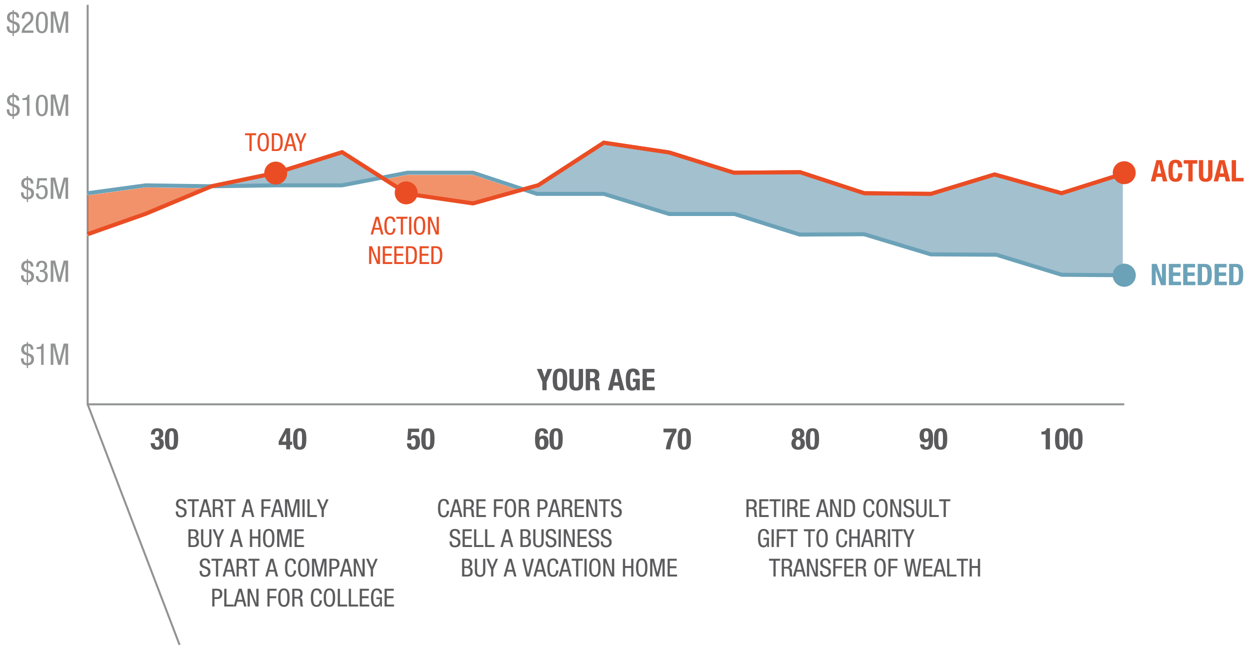
INVESTMENT MANAGEMENT	ADVANCED PLANNING	RELATIONSHIP
Asset Allocation	Cash Flow/Budgeting	Dedicated Advisor and Support Team
Asset Location	Income-Gift-Estate Taxes	Coordination with Other Professionals
Concentrated Positions	College	Monthly Education Pieces
Investment Execution	Charitable	Quarterly Meetings or As Needed
Tax Loss Harvesting	Insurance	
Rebalancing	Retirement	

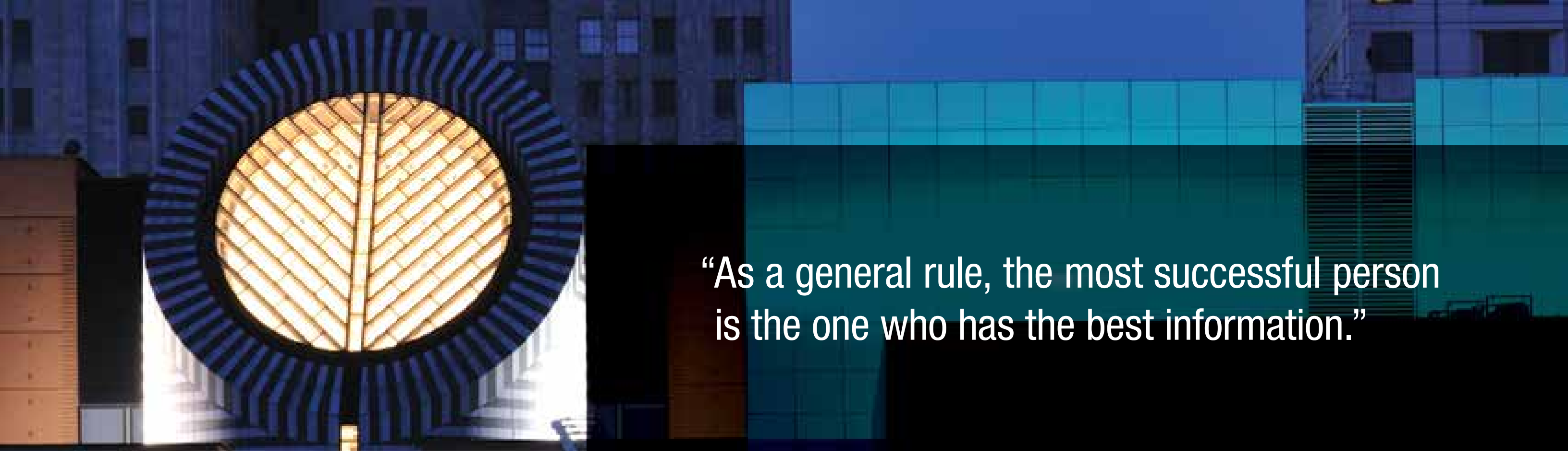
YOUR PLAN

The plan we create together is just a starting point.

As the saying goes “life happens” and there will be times when we get surprised by both positive and negative events. As your goals and circumstances change we will update the plan and make course corrections as needed to ensure plan success.

ASSETS NEEDED VS. YOUR ACTUAL ASSETS

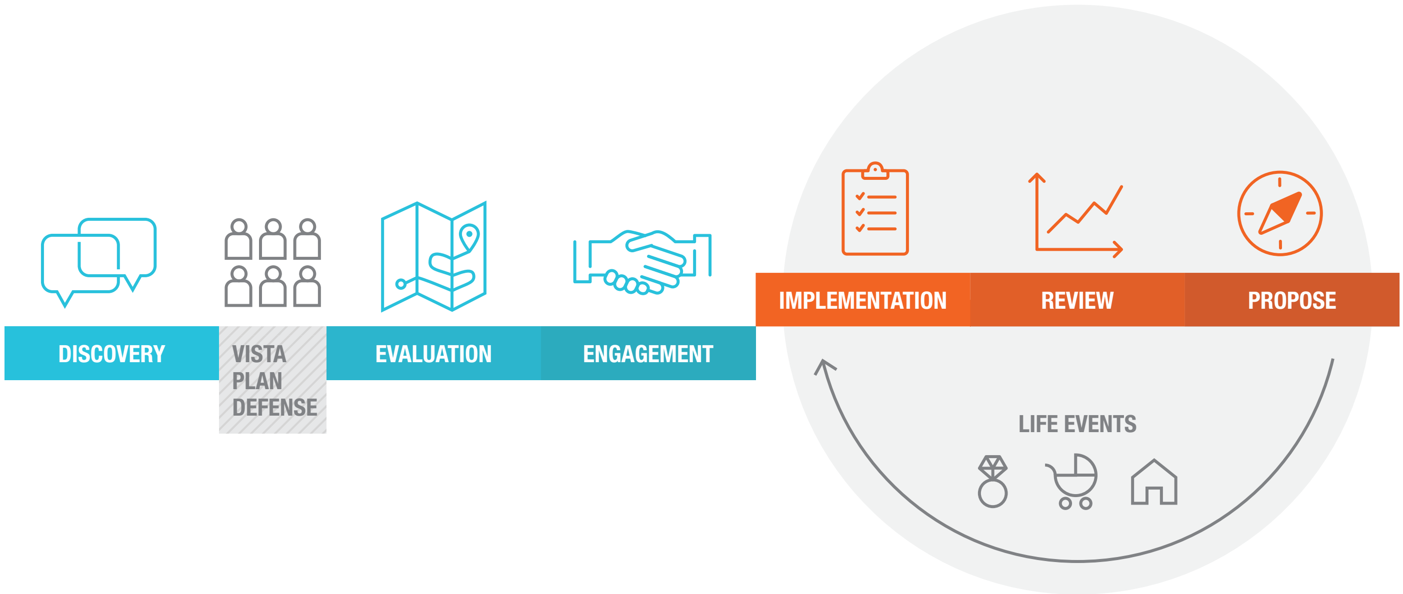




A SINGLE STEP, A LIFELONG JOURNEY

The more complete our understanding, the more comprehensive our solution.

Our process begins with a single step, the Discovery Meeting, and proceeds through a series of interactions that builds our relationship, defines your needs, and constructs a comprehensive plan.

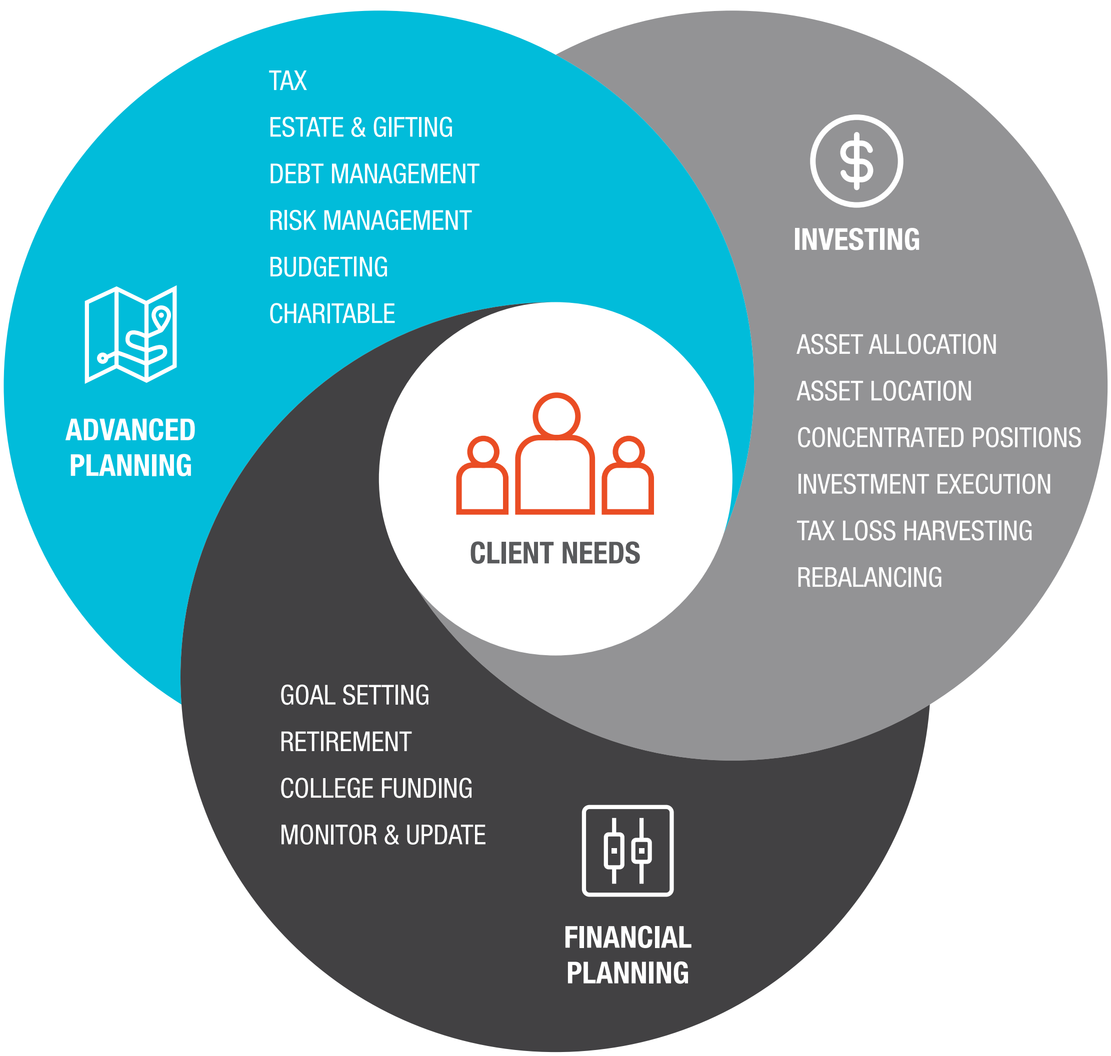


AN INTEGRATED SOLUTION, A PINPOINT FOCUS

The best plan is useless without thoughtful execution.

At Vista, we work as a seamless part of your overall advisory team to ensure complete and comprehensive execution. Working with your CPA, attorney, insurance broker, bankers, and other professionals on your team, we make sure that the most complex financial, tax, or estate plan is carried out with precision.

With you as the focus of our combined efforts, we orchestrate and coordinate all professional input into a cohesive action plan that minimizes risk and maximizes upside opportunity.



"So many of our dreams at first seem impossible, then they seem improbable, and then, when we summon the will, they soon become inevitable."

OPEN COMMUNICATION, CONTINUOUS SERVICE

Communication is the key to our relationships. At Vista, we are known for our ability to establish and maintain open, fluid channels of communication. That's how we've developed life-long relationships with clients just like you.

It's also how we continuously monitor your situation, your plan, and the economic environment, so we can adjust quickly to remedy problems and capitalize on opportunities, refining the strategies as your goals evolve and governances change.

DISCIPLINED INGENUITY, COMPREHENSIVE RESOURCES

If it were easy, anybody could do it. You got to where you are in your life by hard work, discipline, and resourcefulness.

So did we. We've worked to build a select client roster, relationship by relationship.

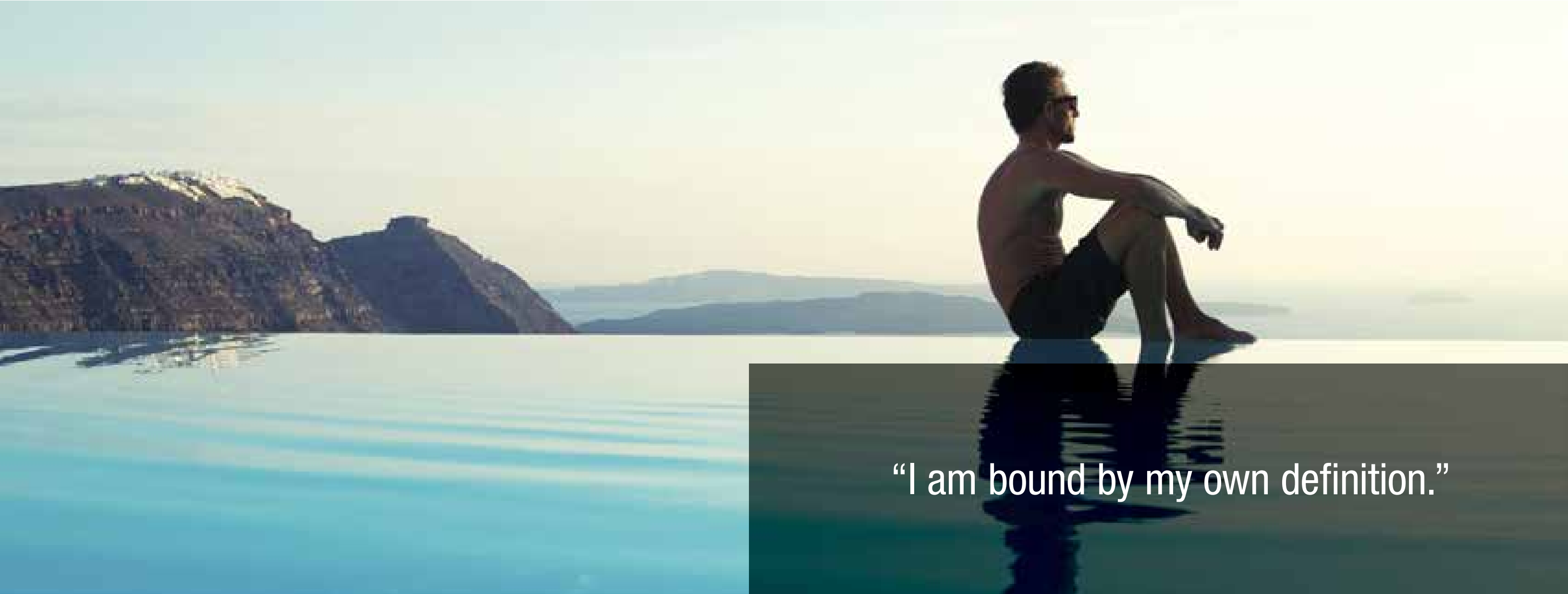
We've done that by bringing a team of experts to every Vista client. And by devoting ourselves to helping our clients achieve their financial goals, from the simplest retirement plans to the most complex trust and estate plans.

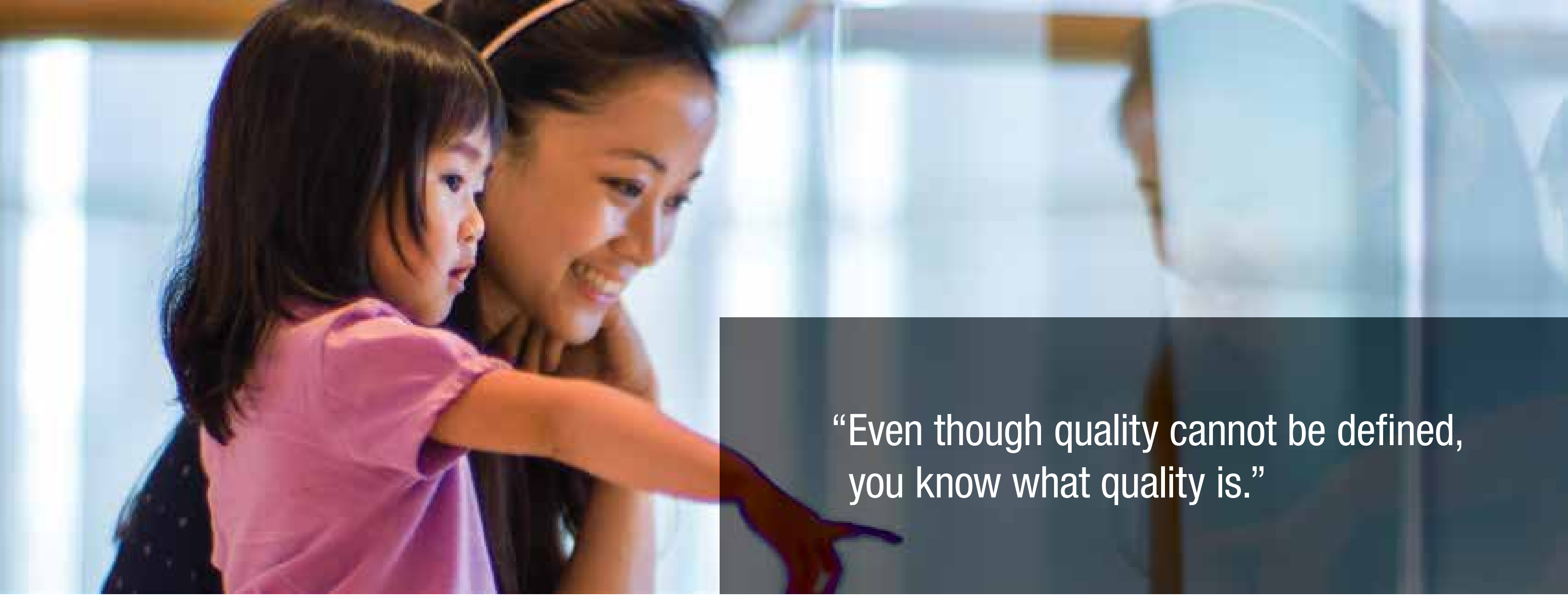
INDEPENDENT ADVICE, UNBIASED ANALYSIS

Vista Wealth Management is a Registered Investment Advisor. We offer experience, expertise, diligence, discipline and talent that is independent.

Since Vista only accepts fees from clients, you can be assured that our only concern is you. Our job is to help you achieve success, however you choose to define it.

To us, that is what it means to be a trusted financial advisor. It's our obligation—and our promise.





YOUR LIFE, YOUR LEGACY, YOUR DECISION

You know better than anyone that having a plan is the linchpin of success. Planning today for your financial tomorrow is just as critical.

It's easy to get started.

For more information, visit us at www.vistawealth.com,
or email us at myfamilycfo@vistawealth.com.

Better yet, call us and arrange an appointment to sit down and talk directly to one of our wealth management professionals. You can reach us at 650.252.0550.

You've earned it and your legacy deserves it.

www.vistawealth.com