

3 Steps towards financial independence

Topel Wealth
Management
& DiStasi
Your Goals, Our Expertise.

begin

We strive to help our clients more fully enjoy the lives they have worked hard to build, by providing a partner in their journey.

www.td-wm.com

imagine

**We understand
your vision.**

step 1

The first step of financial planning is the discovery process. This is where we begin to aggregate and organize each piece of a client's financial life in preparation for rigorous analysis. We want to get to know our clients more thoroughly; their needs and goals, dreams and aspirations, their passions and ambitions, and more broadly, their feelings around money issues.

create

We design a plan to pursue financial strength and stability.

step 2

Analyzing all of the data begins at this step. Each member of our team brings a different skillset and area of expertise to the table, which we combine with best-in-class software and technology to create strategies tailored to each individual client.

An effective financial plan is rooted in facts and statistics, yet flexible enough to incorporate the change that inevitably comes through the years. The analysis process results in client introspection and open dialogue between client, advisor, spouses, partners and other family members.



achieve

We forge a
partnership.

Topel Wealth
Management
& DiStasi
Your Goals, Our Expertise.

step 3

The ongoing relationship with our wealth management clients continues to strengthen as the years pass and trust is built. As your partner in this journey, we help organize, simplify, coordinate and manage all of your financial interests in order to help you pursue a more balanced and fulfilled life.

td-wm.com

**2907 Claremont Ave, Suite 111
Berkeley, CA 94705**

**Phone: 510.898.1270
Fax: 510.898.1604**

Topel & DiStasi Wealth Management, LLC is a Registered Investment Adviser. This brochure is solely for informational purposes. Advisory services are only offered to clients or prospective clients where Topel & DiStasi Wealth Management, LLC and its representatives are properly licensed or exempt from licensure. Past performance is no guarantee of future returns. Investing involves risk and possible loss of principal capital. No advice may be rendered by Topel & DiStasi Wealth Management, LLC unless a client service agreement is in place.