



# Wealth Management

TOTAL CONTINGENCY PLANNING

**A Professional Money Management &  
Real Estate Brokerage Firm  
Est 1997**

I am an independent advisor, and for over 20 years I have helped a set of select clients with their total wealth management needs.

At age 7 my family and I immigrated to the US in 1957. Along with my parents and siblings we numbered a family of 9. We settled in Louisville, Kentucky where my father worked as a union plumber at the University of Louisville during the day, and then put on a suit and tie after dinner to sell door to door material for shirts and suits to supplement his plumber's pay of \$50.00 a week. I have never forgotten the efforts my parents made to make a new life for us in America.

The family moved to San Francisco in 1961. Here, I began working hard to advance my own success by attending prestigious academic schools like Lowell High School and the University of California at Berkeley. Meanwhile, my father and older brother became entrepreneurs as early entrants into the budding California wine scene of the early 1970's.

After going into the family's retail fine wine business, and then later marriage, I returned to school at age 40 to fulfill a desire to practice law. After passing the California State Bar exam I opened my Estate Planning law practice in Walnut Creek, CA.

Here I quickly realized that effective Estate Planning required knowledge of all the sub disciplines that comprise a person's estate; namely, investments, real estate, taxes, retirement, insurance, inheritance, pre-marital and post-marital agreements, charitable giving and much more.

*The letters (TCP) describe what I do:  
Total Contingency Planning.*



## CONTACT

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