



## ABOUT BLANKINSHIP & FOSTER

### WHO WE ARE

Blankinship & Foster is an independent, Fee-Only wealth management firm in San Diego. We are fiduciaries, committed to act in our clients' best interest.

Our thoughtful and experienced team of advisors help you make smart decisions across a broad spectrum of matters. We've been helping clients successfully transition into retirement and navigate life events for over 30 years.

### WHO WE HELP

Most of our clients are in or near retirement or women who have gone through a life changing transition. Our clients typically have one to five million dollars or more in investable assets.

### WHAT WE DO

Our Wealth Management service integrates financial planning and investment management. We cover topics such as retirement, income planning, tax and estate planning, and disciplined management of your investments.

Using our proven step by step process, "The B&F Way", we organize your finances to bring you clarity, confidence and direction in your future.

### HOW WE ARE UNIQUE

- » **We're more than investment managers.** We provide proactive, personalized advice on all aspects of your finances.
- » **We help simplify your finances,** so you can make important decisions with clarity.
- » **We help you navigate** complex information and achieve your goals with bite-sized action plans designed to **"Get to How"**.
- » With fewer than 40 clients per advisor, we offer a **"high-touch" team approach** that ensures we are responsive and knowledgeable about YOU.
- » We make managing your finances less intimidating by **educating and empowering** you.



### HOW TO BEGIN

To take the first step in a new direction, call or e-mail us to schedule a complimentary consultation.

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For more information, please visit our website at [www.bfadvisors.com](http://www.bfadvisors.com)