

2nd Quarter 2017 Recap

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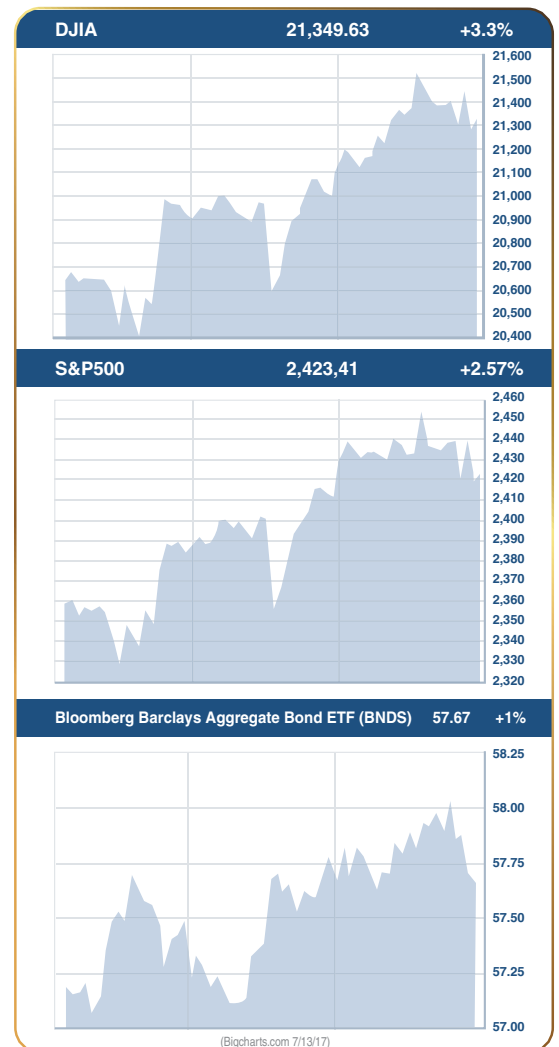
While political stories dominated the headlines, investors enjoyed another positive quarter. The second quarter extended the upward movement of U.S. equity markets from the first quarter, allowing equity investors to enjoy reasonable returns for the first half of 2017.

The second quarter of 2017 also marked the seventh straight quarter that the DJIA and S&P 500 have risen. (www.blogs.wsj.com 7/5/17)

The S&P 500 produced a total return of over 2.5% and closed the quarter at 2,423.41. This is up from the previous quarter's close of 2,362.72. While the second quarter was strong, its overall gain was lower than quarter one.

The Dow Jones Industrial Average (DJIA) increased in the second quarter, but it experienced slower gains than those of the first quarter. The DJIA closed the second quarter at 21,349.63, up from its 20,663 quarter one close.

In June, the Federal Reserve approved the expected second federal funds rate increase of 2017. Back in March, the Federal Reserve raised the rate to between 0.75% and 1%. Currently, as of June's increase, the new range is 1% to 1.25%. During the June Federal Reserve's Committee meeting, it was announced that they will begin the process of reducing their \$4.5 trillion balance sheet sometime in 2017, however their timeline was unspecified. The post-meeting statement noted, "The committee currently expects to begin implementing a balance sheet normalization process this year, provided the economy evolves broadly



as anticipated." (www.cnbc.com 6/14/17)

Some experts believe that both the rate increase and the Fed's upcoming efforts to reduce their balance sheet will produce a more stringent monetary policy during a time when inflation is lower than expected. (www.cnbc.com 6/14/17)

The U.S. economy is continuing to look strong with positive unemployment and housing market data. Unemployment statistics are seeing lower percentages than they typically see 96% of the time since 1970. (www.am.jpmorgan.com 6/17/17)

Due to housing demand, the U.S. housing market continues to have a healthy outlook despite high price gains. "Household formation growth over the past year had a notable uptick this quarter over last, playing a big factor in driving up demand for housing and maintaining a strong market," said David Berson, Nationwide Senior Vice President and Chief Economist. "We are, however, keeping a close eye on affordability and especially house price appreciation as it is well above the long-term average." (www.nationwide.com 6/20/17)

Market Records Continue

The day before the Fed meeting, the market experienced a "Fed drift," the tendency of the markets to rise a few days before their meetings. On June 13, the DJIA rose about 90 points, hitting intraday and closing records, closing at 21,328.47. The S&P also had a record close that day, gaining 10.96 points (0.45%) to close at 2,440.35. (www.cbc.com 6/13/17)

While the markets continue to impress us with records and milestones, it is still prudent for investors to remain vigilant. It is easy to get lost in the headlines that the media presents, however, our job requires us to remind you that it is best to stay focused on the progress of your own personal goals and plans. While year-to-date, the equity markets have been marching steadily higher and bond rates have drifted lower with limited, if any, volatility, experts are predicting more turbulence for the second half of the year. (Barron's 6/12/2017)

Global Watch and Concerns

Brexit is again at the forefront of potential global financial woes. According to Deloitte, "The rate of chief financial officers who expect some negative, long-term effects from a so-called Brexit climbed to 72% in the second quarter of 2017, from 60% in the first quarter." (www.marketwatch.com 7/10/17)

Following the United Kingdom's (U.K.) general election in June, a slowing economy growth of 0.2% (down from 0.7%) in the fourth quarter of 2016, and Brexit negotiations underway in Brussels, many financial executives are increasingly showing lack of faith in the U.K.'s economic stability once it leaves the European Union. While the monetary policy of the U.K. remains in limbo, volatility will remain in the U.K. equity market. (www.marketwatch.com 7/10/17)

Bonds are still considered expensive in all regions. According to Russell Investments 2017 Global Market

Key Points

1. Quarter 2 continued strong adding to a healthy first half of 2017.
2. The Federal Reserve raised the federal funds rate by 25 basis points to 1.0% - 1.25% in June.
3. Equity markets continue to break records.
4. Concerns continue over how global issues will affect markets.
5. Oil prices remain low.
6. Investors need to be cautious and watchful.
7. Focus on your personal goals and call us with any concerns.

Outlook, the U.S. has the closest fair value, while on the opposite end of the spectrum are Germany and the United Kingdom. Japan is still on task for their target of zero percent for the 10-year bond yield and the European Central Bank continues with negative rates and asset purchases until at least the end of this year, the report continues.

Additionally, the geopolitical pressures from North Korea and Syria remain potential global concerns that investors need to monitor. For now, global concerns have not affected the equity markets, but investors still need to be attentive to global issues.

Oil Prices

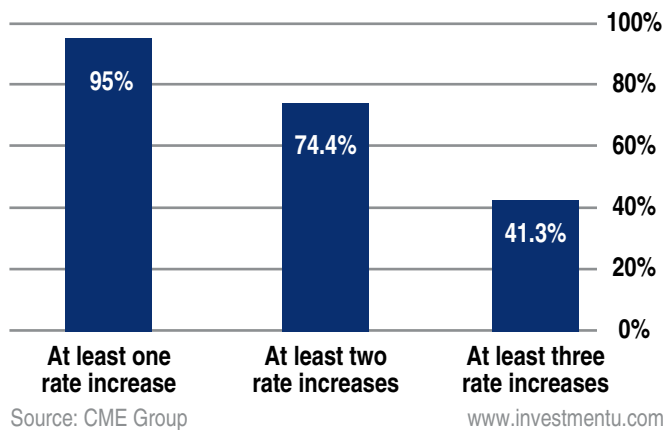
A significant increase of U.S oil production increased the global supply of oil in the first half of 2017. Oil prices continue to stay low, with the price of WTI finding itself steady between the \$44-45/bbl range. With these lower oil prices, U.S. production may begin to slow down. This, along with OPEC attempting to control production levels, may cause oil prices to rebound for the second half of 2017. (www.forbes.com 6/19/17)

"It's going to be difficult to have a rally unless there's a disruption or some news from OPEC," said Olivier Jakob, Managing Director with PetroMatrix. Without any major global conflicts that restrict oil exportation or OPEC inundating the market with excess crude, oil prices should not expect to see major price fluctuations for the remainder of 2017. (www.forbes.com 6/19/17, www.cbc.com 6/15/17)

Interest Rates

For 2017, interest rates should remain high on an investor's watch list. As mentioned, the Fed's raised interest rates by 25 basis points to 1% - 1.25% at their June meeting. This marked the second of three rate hikes that the Federal Reserve suggested we could see this year. There is a third rate increase expected before the end of 2017. Interest rates need to be monitored and there is some speculation as to whether or not the Fed's will actually decide to increase the rate any more this year.

Probability of Interest Rate Hikes by the December 2017 FOMC Meeting Odds Based on Federal Funds Futures



The Fed's announced in June that it will begin the daunting process of reducing its balance sheet that was expanded to help fight the housing crisis that began almost a decade ago. Interest rates are an area that we will continue to watch. Investors should continue to monitor how the bond and equity markets fare with the reduction of Federal Reserve stimulus money.

As short term interest rates rose, the 10-year Treasury yield fell. On June 15, the 10-year Treasury yield dropped six basis points to 2.15%, which was close to a seven-month low that eventually moved back up to close at 2.31% for the second quarter. (www.seekingalpha.com 6/16/2017; ycharts.com)

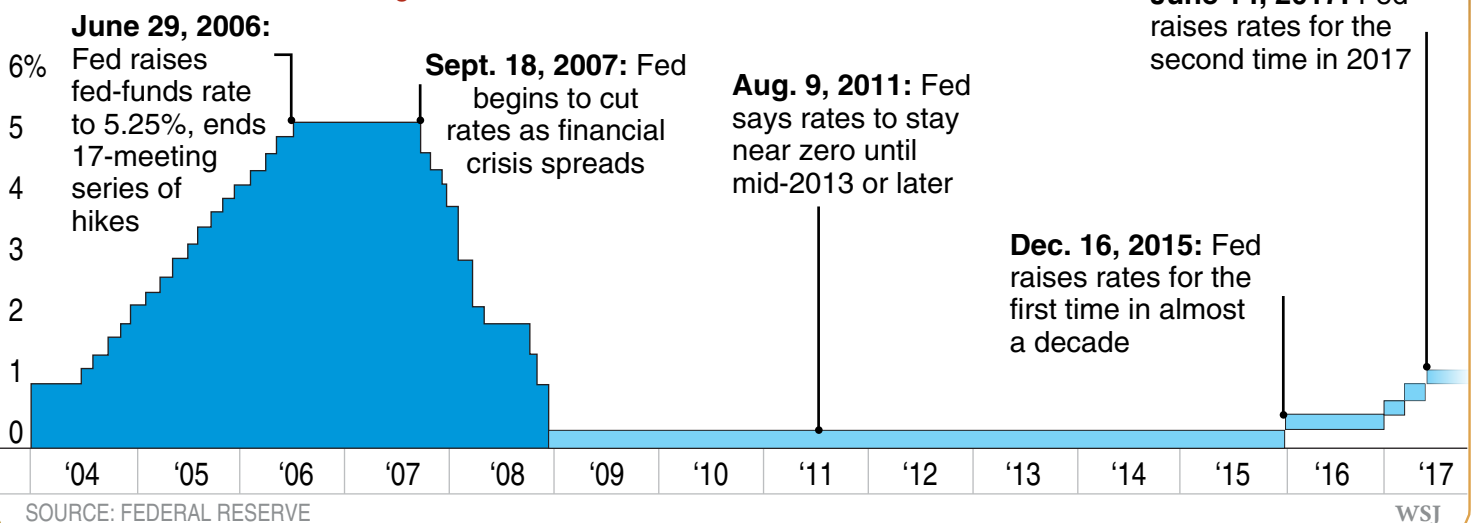
Interest rate concerns arose when Fed Chairwoman Janet Yellen announced that, "The recent lower reading on inflation has been driven significantly by what appears to be one-off reductions in certain categories of prices," reflecting the Federal Open Market Committee's reduction in their forecast for headline inflation down to 1.6% from the 2% target. Yellen herself is not concerned about the weakening inflation trend, stating that it reflects the, "progress the economy has made and is expected to make toward maximum employment and price stability assigned to us by law." (www.cnbc.com 6/14/17)

Fidelity Investments feels that, "Markets are anticipating the Fed will hike rates only twice through December 2018, instead of the 4 times the Fed projects." They also say that, "historically, the yield curve typically flattens as the Fed hikes rates and the business cycle matures, with inversions occurring prior to each of the last 7 recessions. Typically, U.S. equity markets have fared well in a rising interest rate environment, but investors still need to pay close attention to interest rate movements." (www.fidelity.com)

Market Outlook

The second quarter was a healthy one for investors. While the outlook for the remainder of the year still looks positive for equity investors, there are several factors to continue keeping a close eye on.

Federal-Funds Interest-Rate Target



Geopolitical unrest remains, political gridlock in the U.S., oil prices and further interest rate movement can all be impactful on the U.S. and world investment markets. As always, if you are planning on making any investment changes, it is helpful to discuss these changes and your personal situation with us.

Many market analysts are skeptical of the second half of 2017. "It's hard to imagine the second half being as good as the first," says Bill Stone, Global Chief Investment Strategist at PNC Asset Management. Analysts are finding it difficult to believe that the sizeable gains seen in the first half of 2017 can continue. They also suspect that these gains may have taken away from potential gains that might have happened later in the year. (www.usatoday.com 6/30/17)

Skeptical sentiment is resonated with comments as Brian Nick's, Chief Investment Strategist at TIAA Investments, saying, "The market has run as far as it is gonna' run." (www.usatoday.com 6/30/17)

However, some other Wall Street strategists remain optimistic, expecting the 2017 stock market to repeat its successful first half. Jonathan Golub of RBC Capital Markets, known for being Wall Street's biggest bull, believes the market will increase 6-7% before the year end. (www.usatoday.com 6/30/17)

The fact is, U.S. equities are highly-priced, thus the sentiment that they are susceptible to a swing in the other direction. U.S. Treasuries remain expensive and there are many additional factors that can directly impact the U.S., including:

- Geopolitical and social unrest, such as Brexit and the future of the Eurozone;
- Continued terrorist attacks that create an uncertain and cautious perspective with investors;
- Policy gridlock and the potential roadblocks that President Trump's administration will face when attempting to pass the stimulus plan.

The Fed's upcoming balance sheet reduction efforts are worth watching as well, although, according to San Francisco Federal Reserve President John Williams, will be, "widely telegraphed, gradual, and – frankly – boring; and the more public understanding there is, the lesser the risk of market disruption and volatility." (www.forbes.com 5/29/17)

Oppenheimer's Chief Investment Officer reports that, "heading into the second half of 2017, we believe the elongated U.S. credit and business cycle – currently eight years old and counting – will continue through the end of the year. Yet for the first time in almost a decade, the risks to the global economy are centered in the U.S. and not in other major world economies." They go on to also report that "growth in much of the rest of the world is stable or accelerating and "in our view, the biggest threat to the global economy is the prospect of the U.S. Federal Reserve (Fed) further tightening U.S. monetary policy." (www.Oppenheimerfunds.com, *Midyear 2017 Outlook*)

Conclusion: What Should an Investor Do?

For the first half of 2017, stocks have marched higher, bond yields have drifted lower and volatility has not been an issue. Investors have not experienced any dramatic up or down swings, however, that does not mean investors should become complacent.

Barron's reports that, so what if stock markets are up nicely in India, Hong Kong and Korea, U.S. investors have had a lot to celebrate so far this year. Although the republican controlled Congress has not yet, as of this writing, delivered tax reform or the financial stimulus it promised, the S&P 500 has delivered 24 record highs. The main question on everyone's mind is - will the fireworks continue in the second half of 2017? (*Barron's* 7/3/17)

"The market is always vulnerable to a news event, an economic event or an earnings event," says Robert Sluymer, managing director of technical strategy at FundStrat Global Advisors, a Wall Street research firm. (www.usatoday.com 6/11/17)

Guggenheim Global Chief Investment officer Scott MinerD wrote that "stock and bond markets have rarely been more expensive and stable, and that has me worried." This is an ideal time for investors to be cautious and alert. Many experts feel that a diversified portfolio can help provide some shelter from possible storms. However, with interest rates low, trying to generate high returns while achieving diversification can be difficult. (*Barron's* 6/12/17)

**Volatility might return
for investors and
therefore we need to
proceed with caution.**



Today's fixed rate returns will not help most investors reach their financial goals so they probably will need to include equities in portfolios. We are carefully monitoring equity markets and interest rates so we can communicate with clients. Market volatility is a part of investing and instead of being worried by volatility, try to be ready.

Focus on your own personal objectives.

During times that call for caution, it is always wise to create realistic time horizons and return expectations for your own personal situation and to adjust your investments accordingly. We try to understand your personal commitments so we can categorize your investments into near-term, short-term and long-term.

Investors should always be prepared. While the market is currently strong, potential volatility should cause you to be concerned, but panic is not a plan. Market downturns do happen and so do recoveries. This is the ideal time to ensure that you fully understand your time horizons, goals and risk tolerances. Looking at your entire picture can be a helpful exercise in determining your strategy. We always welcome the opportunity to discuss any updates to your thoughts or situation.

Discuss any concerns with us.

Our advice is not one-size-fits-all. We will always consider your feelings about risk and the markets and review your unique financial situation when making recommendations.

We pride ourselves in offering:

- consistent and strong communication,
- a schedule of regular client meetings, and
- continuing education for every member of our team on the issues that affect our clients.

A good financial advisor can help make your journey easier. Our goal is to understand our clients' needs and then try to create a plan to address those needs. We continually monitor your portfolio. While we cannot control financial markets or interest rates, we keep a watchful eye on them. No one can predict the future with complete accuracy, so we keep the lines of communication open with our clients. Our primary objective is to take the emotions out of investing for our clients. We can discuss your specific situation at your next review meeting or you can call to schedule an appointment. As always, we appreciate the opportunity to assist you in addressing your financial matters.

Benjamin Franklin is the only non-President to appear on a bill.

Today, the highest publicly circulating denomination of U.S. paper currency is the \$100 bill. The \$100 is one of the few circulating currencies that does not feature an American president on its face. Founding Father, Benjamin Franklin has the honor.

(Source: Business Insider)



Financial Advisors Network, a registered investment advisor.

Note: The views stated in this letter are not necessarily the opinion of Financial Advisors Network, Inc., and should not be construed, directly or indirectly, as an offer to buy or sell any securities mentioned herein. Investors should be aware that there are risks inherent in all investments, such as fluctuations in investment principal. With any investment vehicle, past performance is not a guarantee of future results. Material discussed herewith is meant for general illustration and/or informational purposes only, please note that individual situations can vary. Therefore, the information should be relied upon when coordinated with individual professional advice. This material contains forward looking statements and projections. There are no guarantees that these results will be achieved. All indices referenced are unmanaged and cannot be invested into directly. Unmanaged index returns do not reflect fees, expenses, or sales charges. Index performance is not indicative of the performance of any investment. The S&P 500 is an unmanaged index of 500 widely held stocks that is general considered representative of the U.S. Stock market. Dow Jones Industrial Average (DJIA), commonly known as "The Dow" is an index representing 30 stock of companies maintained and reviewed by the editors of the Wall Street Journal. Diversification does not ensure a profit or protect against a loss. Investing in oil involves special risks, including the potential adverse effects of state and federal regulation and may not be suitable for all investors. Due to volatility within the markets mentioned, opinions are subject to change without notice. Information is based on sources believed to be reliable; however, their accuracy or completeness cannot be guaranteed. Sources: wsj.com, cnbc.com, nationwide.com, Oppenheimerfunds.com, Midyear 2017 Outlook , jpmorgan.com, marektwatch.com, usatoday.com, forbes.com; Contents Provided by The Academy of Preferred Financial Advisors, Inc 2017

Congratulations Spenser and Dane!



Spenser Messmore



Dane Fahey

The team at Financial Advisors Network is proud to announce Spenser Messmore and Dane Fahey have successfully completed their CFP® Board examinations after years of study and formal education. Spenser is scheduled to fully complete the CFP® certification process in August 2017, and Dane is scheduled to complete it in May 2019.

These two are excited to further their careers and use the knowledge they have gained to help clients achieve their goals through proper and proactive planning. In alignment with the firm's beliefs, they will both continue to provide their services in a fiduciary capacity.

Spenser is a Financial Advisor at our firm, and has worked at Financial Advisors Network since May 2015.

Dane is a Paraplanner at our firm and has worked at Financial Advisors Network since November 2016.

Both Spenser and Dane assist in creating comprehensive financial plans for clients, and believe in the importance of the integration of the five financial planning disciplines (Retirement Planning, Tax Planning, Estate Planning, Investment Planning, and Risk Management) as taught through the CFP® program.

At Financial Advisors Network, we believe it is our duty to educate ourselves so that we can provide our clients with the highest standard of ethical financial advice. Our financial advisors and planning staff have set forth a guideline to follow the CFP Board standards and complete the CFP® Certification.

We wish these two young professionals success as they move forward and grow in their careers.

Rod Kamps and the Financial Advisors Network Team



Left to right: Brian Douglass, CFP®, EA; Rohan Nakrani, MBA; Cherise Wheeler; Gary Allen, MBA; Amy Kamps; Three-year winner Rod Kamps, CEO, CFP®, Spenser Messmore; Umesha Weerasuriya; Dane Fahey; Joe Pence



The New Standard In Personalized Wealth Management

The advisors at Financial Advisors Network, Inc. believe in putting clients first. We recognize that we hold a unique place of trust in the lives of many people, and prioritize our fiduciary duty in all aspects of our business. We act with independence and objectivity and apply our skill, competence and diligence for the benefit of our clients.

We value education very highly. Our planners are passionate about teaching and believe that continued education is the key to empowering our clients. We hold relevant seminars on a regular basis so that we can make sound decisions together, in our frequent client reviews.

Furthermore, we believe that client service should be our utmost priority so that we can effectively address our clients' needs. We use a service team model and have trained a team of professionals to guide you through the financial maze. Our team philosophy allows us to service your financial planning needs with the highest level of quality assistance.

Whether you are planning for retirement, or are already retired, we offer comprehensive financial planning services to help you make prudent decisions regarding tax planning, retirement planning, family estate planning, and investment management.

Contact us today to set up a complimentary financial check-up.

HIGHLIGHTS

- » Education: we prioritize client education, with the belief that prudent decisions are born from proper understanding
- » Service: we utilize a service team model, with a team of professionals prepared to guide you in achieving your financial goals
- » Comprehensive approach: we provide planning services covering all aspects of your financial life, from taxes and estate planning, to retirement and investment management

CONTACT

1432 Edinger Avenue, Suite 200 • Tustin, CA 92780
Phone: 714-597-6510 • Fax: 714-597-6518
www.FinancialAdvisorsNetwork.net

Financial Advisors Network, Inc. is a registered investment advisor.

Award winner seen in
OrangeCoast

The Five Star Wealth Manager award, administered by Crescendo Business Services, LLC (dba Five Star Professional), is based on 10 objective criteria. Eligibility criteria – required: 1. Credentialed as a registered investment adviser or a registered investment adviser representative; 2. Actively licensed as a registered investment adviser or as a principal of a registered investment adviser firm for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by Five Star Professional, the wealth manager has not; A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or Five Star Professional's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through Five Star Professional's consumer complaint process; feedback may not be representative of any one client's experience; C. Individually contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria – considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. Award does not evaluate quality of services provided to clients. Once awarded, wealth managers may purchase additional profile ad space or promotional products. The Five Star award is not indicative of the wealth manager's future performance. Wealth managers may or may not use discretion in their practice and therefore may not manage their client's assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by Five Star Professional or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by Five Star Professional in the future. For more information on the Five Star award and the research/selection methodology, go to fivestarprofessional.com. 1,790 Orange County wealth managers were considered for the award; 172 (10 percent of candidates) were named 2017 Five Star Wealth Managers.

FAN TEAM UPDATE

Summer 2017

The Financial Advisors Network Team has been busy working hard and having some fun too!

Here's what we've been up to lately...



Thank you for joining us for our Backyard BBQ. We hope to see you all again next year! Please log on to our website to see more pictures!



Rod gets dunked!



Mandy, our mascot!



Cherise's daughter ties the knot! Congratulations Mr. & Mrs. Park!

Upcoming Events



ID Theft Training

With much of your Personally Identifiable Information (PII) online and as technology continues to advance, it is important to protect against identity theft! In this ID Theft Training seminar, we will cover some tips on how to protect yourself against ID Theft.

The seminar will be held **Wednesday, September 6** in the conference facilities at Financial Advisors Network located at 1432 Edinger, Suite 200 in Tustin.

Financial Strategies for Successful Retirement

In partnership with Irvine Valley College, Financial Advisors Network (FAN) presents Financial Strategies for Successful Retirement, a financial education class to help you plan your retirement!

This information-rich seminar introduces you to the concepts and practices that will help you spend your retirement comfortably and in control of your finances. Financial Strategies for Successful Retirement will show you a conservative approach to wise money management and will help you identify lifestyle issues facing retirees. You will learn to seek maximization of your income and more from your investments, Social Security and retirement plans. The course will also educate you on how to protect your hard-earned assets from erosion due to inflation and the possible cost of long-term health care.

Your registration fee* includes a colorful, in-depth seminar workbook and a Retirement Planning Data Form that will help you develop a written inventory of your assets, income, Social Security and pension benefits. *Tuition is \$59. Your spouse or guest may be enrolled for an additional \$5. \$64 tuition includes one workbook.

To register online: www.ivc.augusoft.net and follow online instructions.

To register by phone, call (949) 451-5555 between 9am-5pm Monday-Friday.



Choose one of three sessions:

- **Wednesdays:**
Sep 20, 27 & Oct 4
(at Irvine Valley College)
6:30-9:15pm
- **Thursdays:**
Sep 21, 28 & Oct 5
(at Irvine Valley College)
6:30-9:15pm
- **Saturdays:**
Sep 23 & 30
(at FAN office classroom)
8:30am-1pm

Mutual Funds and Exchange Traded Funds (ETF's) will be discussed. Investing in all securities, including ETF's and mutual funds, involve risk, including possible loss of principal. There is no assurance that the techniques and strategies discussed are suitable for all investors or will yield positive outcomes.

For more information or an invitation to any of these complimentary seminars, please contact Cherise - cherise@fanwmg.com (714) 597-6510

Upcoming Events

"Nuts & Bolts" of SS & Medicare Seminar



Curious about the effects of Social Security on your financial situation? You and your friends are invited to this informative education event. Learn about how Social Security may affect your individual position.

Long-time Public Affairs Specialist at the Social Security Administration in Orange County, Frank Van Nostrand will present the "Nuts and Bolts" of Social Security and Medicare. Bring any questions you may have – Frank is an expert!

The seminar will be held **Wednesday, October 11 from 6-8:30pm** in the conference facilities at Financial Advisors Network located at 1432 Edinger, Suite 200 in Tustin.

Frank Van Nostrand is not affiliated with Financial Advisors Network, Inc. The information to be discussed is not intended to be a substitute for specific individualized tax or legal advice. We suggest that you discuss your specific situation with a qualified tax or legal advisor.

Investments Seminar



We invite you to our next Investments seminar to cover a more in-depth look at investments. Join us to learn about:

- Investor psychology
- Investment types
- Investment strategies

This seminar will be presented by Rohan Nakrani, MBA, our in-house Portfolio Manager, who manages and designs our investment solutions at FAN. Rohan will cover a more in-depth look at investments, including: investor psychology, investment types and strategies. During this presentation, investments will be discussed, such as stocks and bonds, which have various risks including loss of principal and may not be suitable for every investor.

The seminar will be held **Wednesday, October 18 from 6-8pm** in the conference facilities at Financial Advisors Network located at 1432 Edinger, Suite 200 in Tustin.

For more information or an invitation to any of these complimentary seminars, please contact Cherise - cherise@fanwmg.com (714) 597-6510

Upcoming Events

Client Appreciation - Giracci Vineyards

Please join us for an evening filled with wine, food and friends at Giracci Vineyards and Farms.

Nestled in Santiago Canyon with its dramatic, panoramic view and etched canyons, just east of beautiful Lake Irvine, Giracci offers a full variety of services, including wine tasting, a wine club, a special events venue and a fully equipped, state-of-the-art equestrian boarding and training facility.

Wine and food will be paired by the Chef and the onsite Sommelier will be giving a presentation on the wines we will be enjoying.

Seating is limited, so please kindly RSVP to Cherise as soon as possible.



Saturday, October 20 from 5:30-9:30pm

Giracci Vineyards and Farms
16162 Jackson Ranch Rd. Silverado, 92676



For more information or an invitation to any of these complimentary seminars, please contact Cherise - cherise@fanwmg.com (714) 597-6510

Share

Share this report with a friend!

This year, our goal is to offer services to several other clients just like you!
If you would like to share this report with a friend or colleague,

Contact Cherise Wheeler
(714) 597-6510 or cherise@fanwmg.com
and we would be happy to assist you!



FINANCIAL 
ADVISORS
NETWORK, Inc.

1432 Edinger Ave, Suite 200
Tustin, CA 92780
Office: (714) 597-6510
Toll Free: (866) 526-7726
Fax: (714) 597-6518
www.FinancialAdvisorsNetwork.net