FIRM OVERVIEW

ANDREWS LUCIA
WEALTH MANAGEMENT LLC

IN BRIEF

- Investment Advisory firm serving a national clientele who seek a personal chief financial officer to deliver a prudent investment approach
- Investment philosophy grounded in academic evidence
- Legally held to a fiduciary standard of care providing advice driven by the client's best interest
- Based in San Mateo and Danville, California
- Fee-only advisor based on a simple schedule of assets under management
- SEC Registered Investment Advisory Firm— ADV available upon request

OUR PHILOSOPHY

We believe that a disciplined and academically grounded investment strategy is the smartest away to build and sustain wealth. As a firm, we champion transparency and clarity. By being selective, we are able to build every client relationship on open communication and trust. As our clients delegate their long-term investment management to us, we strive for them to find their personal lives enriched.

OUR HISTORY

The firm was established in San Mateo, California in 2004. Bob Lucia, a Certified Public Accountant, recognized that many of his existing clients were looking for additional advice and investment services. Clients were seeking a more integrated wealth management solution in order to build robust, sensible financial portfolios. Along with Scott Lucia, CFP®, Bob created the Registered Investment Advisor firm to serve a limited number of high net worth individuals, closely held business entities, trusts and pension plans.

ALWM TODAY

Today, Andrews, Lucia Wealth Management LLC works with families and businesses from across the United States. Our combination of professionals and expertise enables us to serve the needs of our clients in many ways:

- Investment planning
- Education & behavioral coaching
- Coordination with other advisors
- Advanced estate and tax planning
- Family coordination & wealth transfer planning
- Charitable planning