

RBA

WEALTH MANAGEMENT

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PROTECT
YOUR FUTURE
SECURE YOUR
LEGACY



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Personalized Gold Medal Services The New Standard in Wealth Management

At RBA Wealth Management, clients come first!

Our approach to delivering holistic financial services always starts and ends with you, our clients. We begin this process by listening to you and discussing your lifestyles, goals, wishes, dreams and family situations. Through a consultative process we then learn the details of your financial picture so we can construct and deliver a customized plan along with a properly allocated investment portfolio. Our experienced team of professionals fully evaluates your situation to prepare personal solutions that integrate investment planning, tax reduction planning, retirement income and distribution planning, as well as family wealth planning. We then schedule to meet with you on a regular basis to discuss and update your financial situation and make sure you are on track to reach your goals.

We pride ourselves in our superior client services and regular client communications to keep you informed of economic news and appropriate tax law and estate planning rule updates.

Some of the ways we differ from other firms include:

- ☑ Our strong menu of Gold Medal Services which include a comprehensive review of your: tax reduction strategies; estate plans; investment plans; retirement plans; and, protection plans.
- ☑ Our frequent and regularly scheduled meetings with clients to update your specific plans and discuss your personal situations.
- ☑ Our strong and consistent calendar of high quality newsletters, tax reports, and other reports and articles.
- ☑ Our frequent schedule of client educational and appreciation events.
- ☑ Our personal service that features our best and most current ideas, suggestions and solutions.

The New Standard in Personalized Wealth Management



Financial Planning

- Clients will receive a full comprehensive financial plan
 - Discussion and analysis of your financial needs now and in the future
 - Analysis of all current and future economic resources
 - Continual development and implementation of recommendations to fund your financial needs and help maintain a comfortable standard of living
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Investment Oversight Service

- Reviewing your investments and designing a personalized portfolio appropriate to your needs and risk tolerance
 - Year-long, continual monitoring of your investments
 - Regular review of your investment accounts to rebalance and manage to your personalized investment strategy
 - Monthly and/or quarterly statements
 - Independent advice
 - Recommendations regarding positioning of investments within your employer provided retirement plans such as 401(k)s
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Tax Reduction Planning

- Complimentary consultation with your tax preparer
 - Recommendations of tax solutions including tax advantaged investments
 - Special reports on how to help reduce your taxes and other important topics
 - Staying up-to-date on new tax laws that can affect your situation
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Family Wealth Planning

- Analysis of your current estate plan and concerns
 - Complimentary consultation with your attorney
 - Assistance in transferring assets to your Living Trust or other trusts
 - Analysis of the beneficiaries of your IRAs and how to establish an Inherited IRA
 - Providing guidance with the appropriate and necessary steps in the event of the death of a loved one
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Client Services & Communications

- Access to our customized online wealth management portal
- Quarterly "market watch" letters detailing our firm's research, analysis and view of the current state of the investment markets
- Annual meetings to review and evaluate your investment performance, portfolio allocation, and update your financial plan.

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RBA Financial Journey

Gather the Data

At RBA Wealth Management before we ever give advice, we first get to know you. Our objective is to create an individualized financial plan that focuses on your goals and objectives. Before we can begin to do that, we must first hear from you what you're aiming to accomplish, where you are currently as well as who and what are important to you. We never give advice before we understand the whole picture.

Analyze the data

Once we have met with you and familiarized ourselves with your personal needs we begin a full review of your financial picture, which includes:

1. Comprehensive examination of your tax return. We don't want to prepare your taxes; just help you reduce them if possible.
 2. Examine the estate planning needs you have as well as ensuring proper design.
 3. Creation of a full financial plan that monitors and navigates your success towards your goals and creates an in-depth understanding of savings needs for retirement, expenses, cash flow in retirement and overall progress toward your goals and objectives.
 4. Development of a custom built actively managed investment portfolio that is properly allocated and managed to help you reach your goals & objectives.
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Discuss recommendations

In this phase we discuss our findings and share with you the benefits of the changes and how if we were to work together, we would go about optimizing your situation. When this step concludes you will be able to decide if you wish to continue your current course or implement the proposed changes here with us.

Begin implementation

Partnership with RBA Wealth Management begins, accounts get opened, assets transferred over, new investment portfolios are built, action steps of your financial plan begin, and we work side by side with you to ensure proper implementation.

Ongoing partnership

Once you become a client of RBA Wealth Management, you will find that we pride ourselves on communicating with you on a regular basis. In addition to your regular scheduled review meetings, you will receive periodic check-in calls and educational articles that provide insights into items that are focal points for us here in the office.

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Our Commitment to You...

RBA Wealth Management was founded with the goal of assisting clients in every aspect of their financial lives. We offer all clients personal, customized service. For each of our clients, we strive to help create financial stability and confidence to provide financial independence.

Our staff consists of experienced professionals with a "hands on" approach to financial guidance. Our team members are knowledgeable and truly care about helping our clients achieve their goals. Our priority is to keep our clients focused on where they want to go, advise them on how to get there, and continually remind them of the importance of maintaining a disciplined approach to realizing their financial goals and dreams.

Complimentary Financial Check-up

RBA Wealth Management would like to offer you a complimentary financial check-up. We pride ourselves on providing prompt, personal and highly professional services.

We want to offer you a complimentary, one-hour, private consultation with one of our professionals at absolutely no cost or obligation to you.

To schedule your complimentary financial check-up,
please call us at (949) 945-2104.

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Contact Us



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