



A PLACE OF POSSIBILITY™

Del Monte Group is a wealth management firm that delivers a range of strategic, innovative financial solutions based on personalized goals tailored to every client we meet. We believe that our clients aspirations come first, which helps us cater to a lifetime of needs. If you're looking for basic wealth management services, you won't find that here. Our offering is distinguished because of how much further we go, providing resourceful, creative, cost-effective, and tax-efficient ways to help you keep, grow, and enjoy your wealth.



## MEET DEL MONTE GROUP CHIEF OPERATING OFFICER AND PARTNER, ANGELA WRIGHT CFP®, FEA

“When you think about wealth management, what comes to mind? Assets, investments, retirement, the routine financial matters, right? In my world, it’s about so much more. It’s about going beyond the world of money to make sure every person who walks through the door is thriving. If you need a partner to help you navigate a challenging life transition, help building a retirement income, planning for the next chapter of your life, or just to live more of the life you want, please get in touch. I can’t wait to discuss your needs.”

### ABOUT ANGELA WRIGHT

Angela has been advising families and family enterprises since 2003. As Partner & COO, her goal is to ensure that clients and employees of DMG are empowered and flourishing. She is driven to find out-of-the-box solutions that address client needs now, whether it’s related to finances or not. From connecting clients to resources for COVID-19 vaccines to conference calls with farmers, her clients truly are family and not just another portfolio.

In addition to financial strategies, Angela is also a certified Family Enterprise Advisor and third-generation family business owner, supporting her passion for family business consulting and succession. She has a knack for helping people discover their strengths and then applying those strengths to achieve success. Angela also introduced a Results Only Work Environment (ROWE) to Del Monte Group, which holds each employee accountable for specific results (excellent service to our clients) while ultimately liberating them from fixed work schedules and locations. She is a big believer in innovative management techniques and client service methodologies that create sensational outcomes for everyone who steps through the door.

Angela earned a B.S. in business administration with an emphasis in financial services from California State University, Chico, and an MBA from St. Mary’s College of California, Moraga. She also holds the CERTIFIED FINANCIAL PLANNER™ designation. Angela lives in the East Bay with her two young children.

*“Del Monte Group is REALLY great at communication. They provide current and historical market information and an all-around calming effect in a current, uncontrollable world.”*

*-D.B.  
DMG Client*



**One-Size-Fits-All, Won't Fit You Here. If you're looking for out-of-the-box financial wellness support that offers long-term success even while navigating life transitions and challenges, we've got your back.**

Del Monte Group is a fee-based wealth management firm that specializes in providing, individuals, families, and closely held businesses with comprehensive preparations in:

- **WEALTH MANAGEMENT**
- **FINANCIAL PLANNING**
- **BUSINESS TRANSACTIONS**
- **INVESTING**
- **TAX PLANNING**
- **FAMILY AND LEGACY PLANNING**

As fee-based fiduciaries, we are legally obligate to act in your interests only. Every recommendation, every strategy is tailored to you for your benefit. With a thorough intake process and a mission to identify an individual's specific needs, we aim to be thoughtful curators of complete financial wellness providing a true Place of Possibility™ that is comfortable and rewarding both emotionally and financially.

**Do you have questions for Angela, want to know more about our presentations and media opportunities, or are you ready to get started? Contact us today. To reach our team, please call 925.736.6410 or send an email to [Info@APlaceOfPossibility.com](mailto:Info@APlaceOfPossibility.com).**



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