Meet Del Monte Group Founder, Partner, and CEO, Richard Del Monte, JD, CFP®

At Del Monte Group, we're not your typical investment management firm that's here to talk only about how you're going to retire. We dig in to understand what money really means to you for long-term success and how we can take immediate action to help you live more of the life you want, now.

"How do you make wealth management more impactful? It's simple. You go outside the lines. I've been in the wealth management industry for over 35 years, so I guess you could say that makes me an expert, but not in the typical sense. Your basic, run-of-the-mill financial planning doesn't live here. My approach is much more about finding innovative solutions that enhance clients' financial wellness, offering benefits they didn't know were possible. And sometimes that means addressing things in a person's lifestyle that aren't even related to money. If you need a "Yes" man in life, look no further. Believe it or not, it is possible to reach all your financial goals and more, because who doesn't deserve to keep, grow, and enjoy their money? And if that sounds like something you're struggling with, then let's talk!"

ABOUT RICHARD DEL MONTE

Richard holds a JD from Purdue Global Law School, an MBA in financial planning from Golden Gate University in San Francisco, and a B.S. in business administration from California State University, Chico. He's been a faculty member at the Institute for Preparing Heirs, a student of Bowen Family Systems, and a founding member of the Council for Shared Leadership, LLC, which established standards of excellence for values-based advisors and the families they serve.

Richard lives in Alamo, California with his wife, Ingrid, and two golden retrievers. They have five children whom they love to travel with. Some of his community activities include United Way of the Bay Area, John Muir Health Foundation, Boy Scouts of America, and his church.

A nationally recognized expert, Richard has been featured on FOX Business News, and in The Wall Street Journal, The New York Times, Private Opportunities Club, Private Wealth Magazine, Trust & Estates, and Family Wealth Report. Richard is also the author of *Endless Inheritance: Moving from Feuding to Flourishing in Your Affluent Family.*

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 PossibilityTM that is comfortable and rewarding both emotionally and financially.

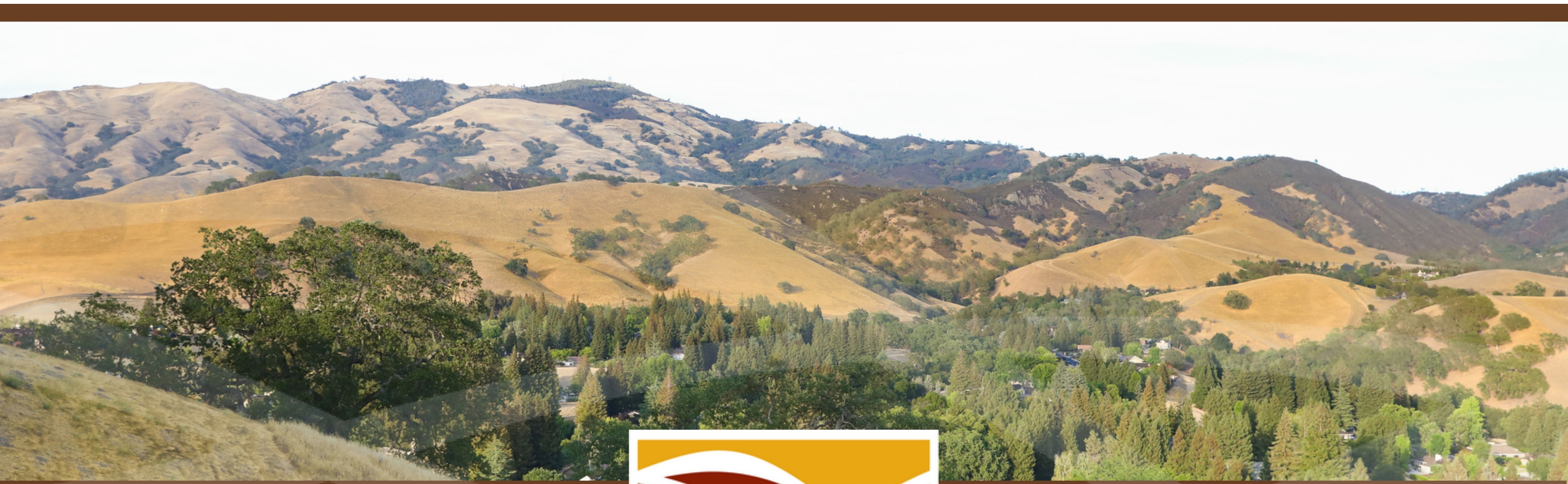
Don't miss Richard on A Place of Possibility Podcast!

Discover Why Listeners Rely on Hosts Richard Del Monte and Angela Wright for a Lifetime of Financial Wellness Support.

Visit APlaceOfPossibility.com/Podcast to start listening now.

Do you have questions for Richard? 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 email Info@APlaceOfPossibility.com.

Please See Important Disclosure Information at www.APlaceOfPossibility.com/Disclosure.



Info@APlaceOfPossibility.com | 925.736.6410

DEL MONTE GROUP

75 Golden Meadow Lane, Alamo, CA 94507
APlaceOfPossibility.com