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[Eric - On Cam]
Eric B. Soiland, CFP®, CIMA®, CIMC®
Senior Financial Advisor, Partner
Apex Securities and Asset Management

Would you set off to hike Mount Diablo without a plan? You might encounter a closed trail – or it could be an extremely foggy day – making your hike far more dangerous.

[Dave - On Cam]
David Roche
Senior Financial Advisor, Branch Manager, Principal
Apex Securities and Asset Management

Planning for your financial future is similar – it's not something advised to do without some research and guidance.

[Eric - On Cam]

Life is a series of transitions – transitions that we can sometimes plan ahead for, while others can catch you off guard. We want to be there to guide you – it's a trail we've covered countless times, so we have a good idea of what could happen and how to help get you back on track if you go off course.

[Dave - On Cam]

As an an independent local investment practice, Apex Securities and Asset Management offers more of a small-town feel. There's always someone here to answer the phone and you're always welcome to stop by to chat and enjoy a cup of coffee.

[Eric - On Cam]

Effective planning starts with a deep understanding of your financial history, where you are now as well as where you'd like to be heading. Mapping that journey with you- and helping you navigate it is what we do best. Our mission is to empower you to make smart financial decisions, big or small, simple or complex, that have a real and lasting impact on your life and those you care most about.

[Dave - On Cam]

Your money has meaning. Our experience has taught us managing your wealth isn't about maximizing your money. It's about maximizing its value. LifeSync℠ is our advice and planning experience that helps you align your financial priorities with your values and help make the right decisions at the right moments, no matter where in life those moments or transitions happen.

[Eric - On Cam]

We work with a variety of clients – from people just starting out with building their wealth plan to retirees to widows navigating a whole new world.

Remember, your life path is a series of transitions – let Apex be your guide. We can help get you to your destination.

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