ADVISOR BIOGRAPHY:

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Nicholas Ventimiglio, CDFA is an independent financial planner located in San Ramon. He has over fourteen years as a specialist in financial planning, advisory services, and investment consulting. Nick is a graduate of California Polytechnic University in San Luis Obispo, and holds a Bachelor of Science in Business Administration with a concentration in Finance. Prior to starting his independent practice, Nick began his career at MML Investor Services in Walnut Creek before moving to an independent firm, Kim Financial Advisors in San Ramon. Additionally, he has worked with such companies as Merrill Lynch Private Clientele Group, and California Financial Advisors. He is an active member of the Rotary Club and believes strongly in the utilization of wealth and success for charitable purposes. Nick has been a guest speaker for many organizations including 40 Plus in Oakland and various Rotary chapters throughout northern California.

With offices in San Ramon, CA, the firm's specialized focus is in financial planning for individuals and families who are experiencing any of three distinct life changing events (transitions):

- Divorce
- Retirement
- Loss of a Spouse/Family Member

Nick’s licenses and awards include:

- Registered Investment Advisor, State of California
- CDFA (Certified Divorce Financial Analyst)
- Series 6 Securities License
- Series 7 Securities License
- Series 63 Securities License
- Series 65 Securities License
- Life & Health Insurance License
- Long Term Care Certification
- Master’s Council – Retirement Income Specialist, 2006-2007
- Rotarian of the Year, 2003-2004

"In everyone’s life there are unexpected challenges and stressful transitions. Whether sudden or expected, making sure these events don't "derail" your future is crucial. You need a tactical financial plan that allows you to securely emerge from life's transitions. The goal of our firm is to provide our clients with peace of mind and most importantly ***the confidence to move forward***."

Sincerely,