REGAL
FINANCIAL GROUP
SAN DIMAS

Carlos Guzman

Financial Advisor

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"It's far better to walk alone than with a crowd going in the wrong direction" – Diane Grant

Carlos Guzman began his advising career over 2 decades ago. Over that time, he has been able to help hundreds of families (both English and Spanish speaking) achieve peace of mind by following a unique 4-step, goals-based process. He has taught financial planning and shared his process at local churches, on the radio and at local high schools. The 4 steps are:

1. ***Discovery (The What):*** *Identifying "What" are your Goals and Concerns and "What" are the opportunities on which you would like to focus.*
2. ***Evaluation/Recommendation (The How):*** *Recommendations demonstrating "How" we will accomplish your goals and have you focus on your opportunities.*
3. ***Implementation (The Why):*** *Providing a customized written plan answering: What your goals are, how we will achieve them and "Why" recommendations are made.*
4. ***Review (Accountability):*** *Ongoing process that provides accountability and ensures we are up-to-date on any changes that may impact your plan's success.*

This 4-step process provides his clients with Clarity, Balance, Focus and Confidence. This confidence gives his clients Peace of Mind to focus their attention and energy on doing what they love most with those they love.

Carlos has been married for over 25 years to his wife Kristina and they've raised 4 children. They call La Verne their home and it is where you can find them hiking the local trails. They love teaching and mentoring couples on marriage principles. They enjoy listening to live music, exercising, and reading non-fictional books that focus on self-improvement.

Anchored by the belief that, "It's better to walk alone than to follow a crowd headed in the wrong direction," his unique process best serves families and individuals that want:

- an advisor that knows how to help them achieve Peace of Mind
- a plan specifically tailored to their needs and goals
- confidence in a trusted advisor that puts their needs first
- an advisor that has open lines of communication

Many of our best client relationships have been related to:

- Family-oriented households that are open-minded to learn new things
- Individuals that are approaching retirement or have retired
- Those that live by the Golden Rule and treat others the way they want to be treated.
- Friends and family members and their referrals of others they care for.

We offer a portfolio review and stress test to help you feel better about your financial goals and how to achieve them.

Send me an email to schedule a discussion and possible evaluation of your portfolio at cguzman@regalfin.com or call me directly at (909)305-8815 to schedule an initial discussion and possible evaluation of your portfolio.

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