



## 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 clients achieve their financial goals by following a unique process. He has taught financial principles at local churches, on the radio and at local high schools. This process involves creating a plan that creates Financial Peace of Mind no matter what life brings. He and his team will share with you this unique process that includes creating a customized written plan that will clearly map out: what your goals are, how we will achieve them and why recommendations are made. This process provides his clients with: Clarity, Balance, Focus and Confidence. His clients are able to focus their attention on doing what they love most with those they love because they've been empowered to take control of their financial future. Carlos has been married for over 25 years with his wife Kristina and they've raised 4 young adult children. They call La Verne their home and it is where you can find them hiking the local trails. They also enjoy listening to live music, exercising, 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 individuals that want:*

- an advisor that will know exactly what their goals are.
- want a plan specifically created to meet their needs.
- want to be able to have full transparency in fees.
- want to be able to trust that their advisor is working to do what is best for them
- want an advisor that is proactive in communication no matter what the market is doing.

*Many of our best client relationships have been related to:*

- Individuals that are approaching retirement or have retired
- Married couples that are homeowners
- Individuals that are open minded to learning new ideas
- Individuals that are motivated, focused, and honest

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](mailto:cguzman@regalfin.com)*