Comprehensive Wealth Management

Shawn helps his clients build and preserve their wealth so they can enjoy the lifestyle they hold dear.

Shawn Claycomb, CFP®, MBA

Certified Financial Planner™, Professional

TRUSTED Advice . . . . EXCEPTIONAL Service℠

WHAT'S IMPORTANT TO YOU?

For Shawn Claycomb the answer is very clear: from spending time with his wife Katie and family, to vacationing, golfing on the weekends, or just walking the dog ... it's about enjoying life and all that it has to offer.

Shawn's clients feel the same way - and that financial independence goes a long way toward helping you truly relax and take pleasure in the lifestyle you hold dear.

Markets rise and fall. Portfolios fluctuate. Tax and estate laws are revised and repealed. The parameters of wealth will change. As the result of marriage, inheritance, retirement, birth and death, so will your circumstances. Shawn is committed to anticipate the impact of any changes in your life and to act accordingly.

A COMFORTABLE FUTURE

Shawn Claycomb takes great pride in helping his clients plan to accumulate and preserve their wealth so that they're free to enjoy the life they deserve.

He understands the more wealth you accumulate, the more options, obstacles and challenges you face. While your financial life remains complex, he can greatly simplify the management of it.

Careful planning and preparation can lead to lasting prosperity. Through proven comprehensive wealth management strategies, Shawn helps his clients build their dreams.

Shawn takes genuine interest in his clients' needs and providing exceptional service.

Enjoy The Life You Deserve

A LASTING LEGACY

Setting financial goals is a life long process that assists you and your family in taking control of your financial future. Your wealth will be part of your legacy, and so it needs proper attention.

Effective investment planning and sound portfolio construction are keys to pursuing your goals. The balance between risk and return go a long way in determining the structure of your portfolio. An effective plan can mean the difference between fortune and misfortune.

There are many challenges to creating and preserving wealth. A good wealth management plan should also help create and implement solutions so you can pass wealth to future generations while minimizing the tax impact.

Personal relationships are the core of Shawn's work.

A TRUSTED ADVISOR

It's important to take the time to select a financial advisor who is competent and trustworthy, one on whom you can depend for professional advice and services. Shawn Claycomb is a Certified Financial Planning™, Professional with more than a quarter century of experience. He holds an MBA in Finance and has taught graduate courses in Economics, Finance and Investments.

Managing wealth successfully requires a broad range of solutions. As a Branch Manager for LPL Financial, Shawn Claycomb has the freedom to offer non-biased financial advice that work best for each of his clients.

EXCEPTIONAL SERVICE

Affluent families throughout Northern California have come to rely on Shawn Claycomb for his comprehensive knowledge and attention to detail in helping them build and preserve their wealth so they can enjoy the lifestyle they hold dear.

Shawn takes a genuine interest in his client's needs and providing exceptional service. He can customize a wealth management plan to help you organize and coordinate your financial affairs, keep your investments diversified and properly allocated for optimal effectiveness and safety, and structure assets to provide needed income, growth and tax efficiency.

Put your finances in the care of an experienced professional that delivers superior service and investment advice. Call Shawn Claycomb and schedule an appointment today.

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ABOUT LPL FINANCIAL

LPL Financial is a leading source of independent objective advice for accumulating and managing personal wealth. Because LPL Financial doesn't offer proprietary products or engage in investment banking activities, Shawn can devote his time and energies to understanding your individual financial objectives and provide unbiased investment recommendations that best suits your needs.

- #1 independent broker/dealer in the nation.*
- Over $3.1 billion in revenue.**
- Over 12,500 affiliated financial advisors nationwide.
- Over 3,000 staff with headquarters in San Diego, Boston, and Charlotte.
- Over $300 billion in assets as the broker/dealer of record.**

* As reported by Financial Planning magazine, June 1996–2008.
** As of December 31, 2008.