Our Mission

Our goal is to create wealth for our clients by managing their mortgage and to build a mutually beneficial relationship with our referral partners.

I am truly passionate about my profession, and the result is that nearly 100% of my business is by referral from satisfied clients, trusted financial advisors, and the most experienced realtors in Southern California. My mission is to carefully guide clients through the entire home loan process, so that they feel confident as they make choices about the many options available for their financing strategy. With many years and a wide range of experience in the mortgage industry, my team and I stand ready to assist each and every step of the way.

Our team has spent several thousand dollars, and over 100 hours last year alone, in education to raise our knowledge level on investments and advanced mortgage planning. Our education is ongoing as our market is ever-changing. Since there are over 300,000 loan officers, currently in the United States, we must separate ourselves from the crowd. We demand excellence from ourselves and demonstrate that to our clients.

We help our clients successfully manage their home equity to increase liquidity, safety, rate of return, and tax deductions. Unlike a traditional loan officer, our role is to help our clients integrate the loan that they select into their overall long and short term financial and investment plan to help minimize taxes, improve cash flow, and minimize interest expense.

The final outcome is to make sure that their home loan choices create greater wealth and a more beneficial retirement. With strategic mortgage planning, we help our clients potentially retire earlier with greater assets and an income that lives into perpetuity.