Confidence in Your Future

Carol L. Fishburn, CFP®

BRENTWOOD ADVISORY GROUP, LLC

FINANCIAL PLANNING & INVESTMENT MANAGEMENT

OUR MISSION

Provide high quality, personalized investment management and financial planning solutions and services designed to meet our client's long-term financial goals within their individual risk parameters.

OUR INVESTMENT PHILOSOPHY

We believe in a long-term, diversified approach to investment management. Special attention is given to asset allocation and diversification, risk versus return scenarios and tax impacts.

OUR FEE STRUCTURE

As a fee-based firm, our goal is to demonstrate to our clients that our fees for services rendered are not a cost, but an investment in their futures. We want to jointly build a team that works together to build a foundation for financial security.

THE BRENTWOOD ADVISORY ADVANTAGE

Imagine having a CFO for your personal affairs, someone accountable for refining your diverse financial goals and presenting a comprehensive strategy for reaching them. Someone who could then micro-manage all your assets, investments, holdings, banking, portfolios and insurance. A personal CFO who constantly monitors your financial situation, then analyzes, reports and is responsible solely to you.

As your professional partner in financial planning and investment management, we will work side by side with your CPA, estate attorney, insurance companies and other professionals to *simplify your life.*

BRENTWOOD CLIENTS

Our clients are individuals and their families who are looking for a long-term relationship with a professional financial partner in order to simplify their lives. They would like to have someone develop and review their financial plan and generally no longer want to manage their investments. It's like having a personal Chief Financial Officer (CFO)!

THE BRENTWOOD BENEFIT

Brentwood Advisory's main focus is providing our clients with a comprehensive financial plan to aid in building financial security. Included in the plan are investment management services which provide an analysis of current investments as well as an investment plan going forward.

Because the financial planning process is the foundation of our investment philosophy and process, we *prefer* to provide a comprehensive plan rather than separating the two services. This allows us to develop and implement a plan to ensure that your overall financial goals can be achieved.

TEAM APPROACH

In order to provide the highest level of proficiency and excellence to our clients, services not performed by the Brentwood Advisory team are outsourced to specialized providers. We then act as the team leader; working side by side with the client. These professionals and service providers include, but are not limited to, CPAs, estate attorneys and other legal advisers, banks, insurance companies, real estate agents and other professionals, as required.

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Carol L. Fishburn, CFP®

BRENTWOOD ADVISORY GROUP, LLC

Carol Fishburn, CFP® has a unique background that brings together expertise in investments, real estate, insurance, banking, lending and other financial services. With this knowledge and experience, she is able to guide and advise clients as they evaluate and plan for their financial future.

Carol brings over twenty-five years in professional experience in the financial services industry of which over 15 years was directly in the investments and securities field. She has completed the Certified Financial Planning program from the College of Financial Planning and subsequently was awarded the CFP® designation. Carol also has a Masters of Business Administration with an emphasis in finance.

Her professional experience includes over two years with City National Bank in their trust department, City National Investments, as a Vice President of Investments. She spent over seven years as a Vice President with Great Western Financial Securities managing several departments within their broker/dealer and mutual fund companies. Prior to Great Western, Carol was a Senior Vice President at Glendale Federal Bank (GlenFed). During her 17 year tenure, she held various positions of increasing responsibilities in management, lending and financial services. While at GlenFed, Carol served on the Board of Directors of GlenFed Brokerage Services and GlenFed Insurance Agencies.

Education:

Bachelor of Arts: University of California, Santa Barbara
Masters of Business Administration: California State University, Sacramento
Ongoing CFP® continuing education courses

Designations

CFP® designation from the Board of Certified Financial Planners

Affiliations

Member, Financial Planners Assn. (FPA), San Gabriel Chapter 2001 - present, Past President 2003
Member, Beverly Hills Estate Planning Council 2004 to present, President 2008 - 09
Member, Women's City Club of Pasadena 2005 to present, Board Member 2006 - present
Member Fiduciary Round Table of the San Gabriel Valley 2004 to present

Our website: www.brentwoodadvisorygroup.com

"50 Distinguished Women in
Wealth Management"
Wealth Manager Magazine
July/Aug 2007

"Top Dog"
Wealth Manager Magazine
July/Aug 2008
July/Aug 2007

"Top Dog"
Bloomberg Wealth Manager Magazine
July/Aug 2003

"Best in Show"
Bloomberg Wealth Manager Magazine
July/Aug 2002