

Exclusive by Design

By catering to a niche clientele, **Weatherly Asset Management** delivers exceptional long-term results.



“We’re in it for the long haul with our clients, and we want to make sure that relationship has a strong foundation from the start,” says Kelli Burger, CFP®, wealth management advisor and partner at Weatherly Asset Management. As an independent, fee-only registered investment advisory firm, Weatherly is intentional in its growth to keep the focus on delivering exceptional, personalized service to existing clients.

Building lasting professional relationships with their clientele is an important piece of Weatherly’s culture and is highlighted by the longevity of the firm itself and their high client retention rate. “Each new client should be a good fit from a long-term relationship standpoint,” Burger says. “We never want to sacrifice the quality of service that we provide to our current and future clients so we evaluate each potential relationship with care.”

Founded in 1994 by former Wall Street investment banker Carolyn Taylor, Weatherly serves the financial planning and investment needs of a core customer base that includes

entrepreneurs, high net worth families, and women. By focusing on these niche client groups, the firm can provide responsive, sophisticated services that speak to individual client needs.

“We’ve made the deliberate decision to maintain a boutique approach to service and culture, providing a unique value proposition for our clients,” says Brent Armstrong, CFP®, wealth management advisor and partner. “When our clients call us, they don’t get an automated system. They don’t have to leave a message on our voicemail. Instead, they get instant access to our team.”

Thinking Like the Client

Taking a comprehensive approach means Weatherly’s experienced advisors contribute their collective strengths to help clients achieve their financial goals.

“We have a number of subject-matter experts in different areas,” Burger says. “When a client has a specific question, we can bring in one of our experienced team members to help with

problem-solving and brainstorming, or to act as a sounding board.” The firm emphasizes their core pillar of lifelong learning by how they collaborate as a team as well as the work they do with their clients.

Eschewing the industry standard of a one-size-fits-all approach, Weatherly seeks to dig deeper, providing personalized attention and curated assets. From money management to retirement, philanthropic, and estate planning guidance, every service is tailored to the nuanced needs of individual clients.

“Our focus allows us to have real conversations with the people we work for,” Armstrong says. “The most important thing a client can understand is that they are hiring a team of professionals that will work tirelessly to meet their goals and demands with a customized portfolio specifically designed for their needs. This allows us to think like the client and to build individual strategies that are tax efficient and tactical, all for a single advisory fee.”



832 Camino del Mar, Suite 4
Del Mar, CA 92014
858-259-4507
weatherlyassetmgt.com