Our Vision

In 1996, I started CSI because I saw the costly mistakes many retirees were making with their finances.

Over the years, I've discovered that most people have a hodge-podge of financial arrangements. They are often put together at different times by different people, and there is no cohesive plan.

This lack of a coordinated, comprehensive financial plan can increase the likelihood of higher taxes, unnecessary costs, poor performance, missed opportunities, and additional risk.

That is why I created a structured process to help avoid these financial mishaps.

This process, where I get to know you and work with you in putting all of your financial pieces together in order to try and best achieve your retirement dreams, provides you with your own personal and customized, ***'My Ideal Retirement Plan.'*** Then, we have regular reviews to stay current and keep you on track!

Our Clients

- Value financial direction
- Appreciate accurate, timely information
- Seek professional, comprehensive advice
- Want effective strategies to help reach their life goals
- Enjoy a doughnut and a hot cup of coffee

CSI Wealth Management

(626) 294-0414
www.rmillercsi.com

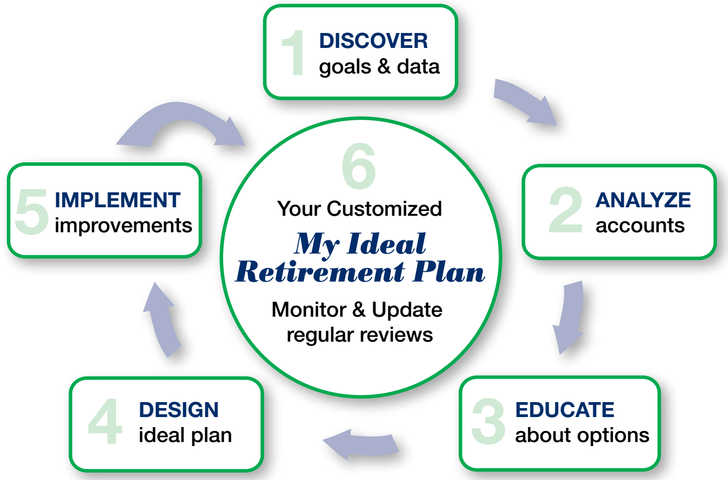
Personalized For You

We work with your CPA and Attorney to create a coordinated, comprehensive financial plan personalized just for you. It's about taking the time to really get to know you and your dreams.

Your, ***'My Ideal Retirement Plan'*** covers all six (6) areas of your financial life:

Cash Flow	Insurance	Taxes
Debts	Investments	Estate Plan

Our Process



"Our objective is to do such a great job, and give you such excellent service – that you'll want to introduce us to everyone you know!" *– Rick Miller*

About Rick Miller, CFP

Mr. Richard (Rick) Miller is the president and founder of CSI Wealth Management. His business focuses on Retirement, Financial, and Estate Planning. Since 1981, Rick has been helping individuals and families implement financial strategies aimed toward accomplishing their life goals.

Through his retirement workshops, monthly newletters, newspaper articles, and in-office consultations, Rick has shared his knowledge with thousands of retirees for close to 30 years. Rick has a passion for educating people about how to prudently manage their financial affairs.

Mr. Miller is a Certified Financial Planner (CFP) and holds Security Licenses, Insurance Licenses, and is State Certified for Long-Term Care Planning. Because of his knowledge and experience, Rick has been sought after to give educational talks to a number of prestigious organizations: Huntington Memorial Hospital, Leisure World, Kaiser Pemanente Retirement Association, USC 48 Hour Care Givers Retreat, The American Association of Universtiy Women, and Arcadia Methodist Hospital, as well many other organizations throughout California.

Along with his numerous speaking engagments, Rick has authored various financial, investment, and retirement planning articles over the years.

Rick and his wife, Laura, have been happily married since 1991. They have two sons, Greyson and Ethan. Rick and his family have lived in Glendora since 2001.

Rick is a dedicated and caring advisor, who loves what he does.

Special thanks to: Yvonne Morrow of Outhouse; www.outhousepromos.com; Arlyne Sanchez of Art 2 Ink, Inc., www.art2ink.com; and Raymond Elgin of Belle n'Beau Photography, www.bellenbeau.com