DEB SIMS
Engaging Women in Wealth

Deborah Sims

My Story

As a wealth advisor who has been in the industry for decades, I have witnessed many women experience monumental financial and emotional tragedies due to unanticipated financial needs. I have also personally experienced some of the common fears shared between many of my clients. One of these events completely changed my life.

In 2005, I unexpectedly became a foster mother to four teenage girls, raising them alongside my three teenage daughters. Being a foster mother was no simple task and taking care of seven girls on my own while also running my practice as an independent wealth advisor added to my already overfilled plate. This required some major adjustments to our budgeting and schedule, but we were lucky enough to have caring neighbors and friends who helped in any way they could, whether it was driving the girls to school or bringing over a meal.

After nine months, my journey as a foster mother came to an end and the girls returned to their family. Each of our lives fell back into place and, over this past decade, I have watched these girls transform into strong and capable women.

I share this story because this experience changed my life, my perspective, and my purpose as a wealth advisor. I witnessed four young girls go through an unpredictable series of tragic events where they had no say or control in what was going to happen to them. While this was an overwhelming and sometimes frightening time in my life, by taking these risks I found a purpose for the rest of my life: helping women plan for the unexpected and take control of their financial lives so they can be prepared for any challenge that comes their way.

I founded Engaging Women in Wealth to pursue my mission of helping women make confident and educated financial decisions.

How I Can Help

As an independent firm, Engaging Women in Wealth serves as a team that you can trust to provide objective advice and guidance. We can help answer the common financial questions women may have, such as:

- What's the risk in my financial portfolio?
- Am I paying too much in taxes?
- What should I do with my 401k, TSP, 403b now that I'm not working?
- How can I better understand my financial statements?
- When can I retire?
- How do I effectively manage my assets?
- What is the best way to consolidate my numerous IRA accounts?
- How do I get started with an estate plan?
- How can I create a steady stream of income that lasts through retirement?
- What is an alternative to a 1031 exchange?
- How can I leave a legacy for my children?

By offering education and guidance, our aim is to help clients make wise investment decisions and pursue financial independence.

Deb Sims honored her for her service as a top producer and member of the President's Club with Summit Brokerage's President and CEO, Marshall Leeds.

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My Services

We strive to make a complicated process simple. - Deb Sims

Largely working with women in San Diego and Rancho Santa Fe, our services include:

- Fee Based Asset Portfolio Management
- Tax Efficiency
- Risk Management
- Retirement Planning
- Financial Planning
- Estate and Charitable Planning
- Creating Wealth Plans for a Family Legacy

Our focus is on protecting the wealth one has acquired throughout their lifetime. We work closely with a network of locally renowned estate planning attorneys and CPAs in San Diego to provide clients with access to a variety of services and professional advice.

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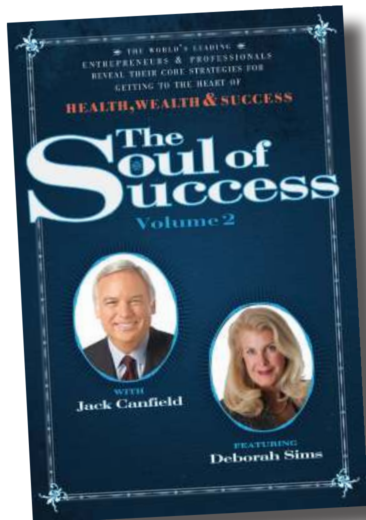
In offering these services, we strive to simplify the process and make it easy for clients to understand their financial strategies and investment opportunities. We use a three-step process to create a comprehensive plan for clients' financial future.

First, we start with an introductory meeting. This time is spent getting to know one another. Our goal is to work with positive individuals who want to learn and grow. This meeting allows us to share more about our mission and learn more about the clients' concerns and desires.

Once we have identified the client's values and agreed on his or her objectives, we review the financial documents to interpret a financial destiny. Following, we create a financial roadmap designed to fulfill personal dreams.

Through this process, we strive to help our clients grow, protect, and preserve their wealth for present and future generations in a tax-efficient manner while simultaneously attempting to increase returns and reduce risk.



About Deb

Deb Sims is a Best-Selling author and the proud mother of three daughters, Devon, Shelby, and Taylor. Outside of the office, she stays active in the great San Diego outdoors, including running on the beach, hiking, and swimming. She enjoys live music, experiencing new restaurants, wine tasting and traveling. Some of her favorite travels include New York, Bali, France and Prague. In addition, she is active in her community and belongs to Rancho Santa Fe Foundation Women's Fund, USC Trojan League Associates and the Rancho Santa Fe Rotary. Deb is also a member of Country Friends and a member of the Village Church in Rancho Santa Fe.

Her book was co-written with Best-Selling Author Jack Canfield, The Soul of Success, Vol.2 : The World's Leading Entrepreneurs and Professionals Reveal Their Core Strategies for Getting to the Heart of Health, Wealth and Success. Deb's chapter is titled "Discovering My Purpose," and narrates her career in financial services and journey discovering her mission to help every woman feel more confident in her financial decision making.

Based in San Diego, California, Deb's team has offices in Rancho Santa Fe, Old Town, and Del Mar. Deb enjoys meeting new people to see if she may be able to help them pursue their financial goals. She invites you to contact her today at 858.756.0004 or by email at dsims@estatemanagementgroup.com.

Engaging Women in Wealth is an independent firm with securities offered through Summit Brokerage Services, Inc., Member FINRA, SIPC. Advisory services offered through Cetera Investment Advisers LLC, a Registered Investment Adviser.

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