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## *Who We Are*

WIN-TEAM is a comprehensive financial services firm that boasts one of the most respected reputations in all of Southern California. Headed by E. Anthony Reguero, WIN-TEAM strives to separate itself from other firms with its versatility in dealing with the needs of its clients with whatever financial decisions they are faced with. Clients do not get the expertise and service of an advisor when they come to WIN-TEAM; they get the collective attention of each and every associate and staff member - a WINning TEAM to guide them through their retirement.

## *Why Choose Us*

We at WIN-TEAM believe that our commitment to being the financial lifetime advocate for each of our clients partnered with 80 years of collective experience is what sets us apart. Our team of Financial Advocates is dedicated to guiding you through and understanding your tolerance for risk and reward in order to help protect your family's legacy.

## *Our Mission*

The driving ambition of WIN-TEAM is to create a Unique Ability firm and design Unique Processes that will give the clients comprehensive results in the tax and asset management arenas. We operate with the understanding that we are to be advocates for our clients' financial interests and approach their goals with a realization that "We get everything we want in life by helping others get what they want."

## *Our Values*

### **Advocacy**

We at WIN-TEAM aim to be lifetime financial advocates for our clients. We believe that enhancing and perpetuating our client's financial legacy aligned with our best efforts to meet each client's personalized financial needs is the key to partnered success.

### **Integrity**

We always have and will continue to do our best to cultivate client relationships that are built upon trust and respect. Our goal is to preserve credibility on our end by striving to provide real, working solutions and by always keeping the best interest of each client in mind.

### **Transparency**

Sometimes the quality of advisement is only as good as its relational foundation. That is why we always take the proper steps to ensure a context of mutual transparency and care with our clients. We believe constant communication is essential in building and maintaining a strong lasting relationship with each client.

### **Teamwork**

Our team continuously strives to maximize service excellence for our clients by focusing on the Unique Abilities in each of our team members. By implementing each team member's talents while acting in unity, our firm offers a collective effort of individuals whose common goal is to always put the client's needs first.

### **Innovation**

In providing comprehensive services to our clients, thinking outside of the box is crucial. While having a rock-solid foundation of values is important, remaining flexible and adaptive to the changing economic climate in the way of strategies and technologies is vital to the success of our clients and, accordingly, our own company.