NEWS

For Immediate Release

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Silver Oak Wealth Advisors Launches New Website

New website designed with fresh, modern look and optimized with speed and ease-of-use in mind

LOS ANGELES, CA (September 8, 2021) – Silver Oak Wealth Advisors, an SEC Registered Investment Advisory and comprehensive financial planning firm located in Los Angeles, just launched their new website at www.SilverOakWA.com. Designed with a modern and fresh look and feel and optimized with speed and ease-of-use in mind, current and prospective clients can quickly navigate the Silver Oak website and find the information for which they're looking. In addition to learning more about the team at Silver Oak, as well as their services, specialties, and methodology, visitors can access blog posts, videos, and other educational resources, learn about upcoming events and webinars, and access the client portal to login to accounts and view portfolio reports and financial plans – all easier and quicker than ever before.

The new homepage of the website features an image of a beautiful conch shell on the beach. "Vedic myth says that the conch appeared from the water after the great churning of the ocean. Perhaps that is why it is so beautiful – the polishing that occurred while in the water gave it the distinct characteristics that can be seen and appreciated once the churning stops," said Silver Oak's President Linda Cao, MBA, CFP®, CeFT®. "Used as a spiritual symbol in many cultures throughout history, this beautiful shell is associated with courage, resilience, and wisdom. It can serve as a touchstone for moving through life."

Silver Oak Wealth Advisors specializes in helping clients manage – and even appreciate – change. Their focus is on financial well-being, personal well-being, and family well-being. They strive to understand each client's goals and underlying values pertaining to money, then create a systematic path toward achieving those goals. This is the heart of what Silver Oak offers.

RETIREMENT, LEGACY, AND TRANSITION PLANNING AT THE CORE

Silver Oak focuses on three specialties featured prominently on the new website:

1. Retirement planning, re-imagined
2. Transition planning for women
3. Preparing family heirs

When it comes to retirement planning, Silver Oak helps their clients reimagine retirement. By providing active guidance and planning in navigating this transition, they help clients create a future that is not only financially secure, but also inspiring, purposeful, and fulfilling.

Another specialty Silver Oak focuses on is transition planning, specifically for women. Making smart financial decisions is especially important for women at the time of major life transitions such as divorce or widowhood. There are unique emotional, mental, and financial challenges to work through when transitioning from being part of a couple to being single. As a women-led firm, Silver Oak has the empathy and know-how to support and empower women through unchartered territory.

Silver Oak also specializes in preparing family heirs to inherit multigenerational wealth. As wealth accumulates, many begin to see themselves as a family steward with a financial legacy to pass to heirs. Silver Oak helps clients keep their financial house in order and aligns their wealth transfer plan with their personal values and best intentions, all while ensuring heirs have the knowledge and development to thrive in their independent lives.

In addition to these specialties, on the new website visitors can learn about Silver Oak's methodology when it comes to wealth management, transition planning, and investing, plus access educational resources. Clients and other interested parties can visit the website at www.SilverOakWA.com.

ABOUT SILVER OAK WEALTH ADVISORS

Silver Oak Wealth Advisors, established in 2005, is a comprehensive wealth management and financial planning firm located in Los Angeles, California, providing services ranging from investment advisory, retirement planning, transition planning, multigenerational wealth management, and more. Silver Oak delves into and continues to monitor the key components required to maintain financial well-being. Team members provide holistic guidance and become not only wealth managers for their clients, but also thought partners and life coaches. In addition to earning an MBA and the CeFT® (Certified Financial Transitionist) and CFP® (Certified Financial Planner™) marks of distinction, Silver Oak President Linda Cao has studied with the Kinder Institute of Life Planning and The Financial Transitionist Institute (previously known as The Sudden Money Institute). Cao is available for media interviews and can cover a wide range of topics related to personal financial planning, retirement planning, investments, transition advice, and legacy planning. Learn more at www.SilverOakWA.com.

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