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Joshua M. Bradburn, CFP®, CWS®

Vice President - Financial Consultant

Charles Schwab & Co., Inc.

Spinning Wheel of Financial Education

Joshua Bradburn, CFP®, CWS® • 1st
VP - Financial Consultant: Helping clients own their tomorrow
3mo

Everyone loves the Big Spinning Wheel of Financial Education, and Doughnuts. What a fun time partnering with the Santa Monica Chamber of Commerce for their annual New Heroes Gala. Thankful to have participated again this year. Thank you #SidecarDoughnuts for the delicious treats. Making #FinancialEducation fun again Stacey Panenhanouvong Robert Blunt Sr. Doug Wilson Charles Schwab Santa Monica-Malibu Unified School District #financialplanning #wealthmanagement #moneymatters #networking #SantaMonica #teamwork

91 Likes · 4 Comments

- 95 likes/comments
- Visibility with local business groups
  - Sidecar Doughnuts
- Engagement with sponsoring organization

Santa Monica Chamber of Commerce 3mo

Thank you for coming out and supporting our community programs!

Like Reply

#NewHerosGala

- 110 likes/comments
- Ability to showcase team efforts in supporting local initiatives
- Engagement from across the nation

Karen (Casey) Cortese • 2nd 3mo ···
Managing Director, Community Services at Charles Schwab
It takes a village...and man, do we have an amazing village at Schwab!
Like Reply | 3 Likes · 1 Reply

Joshua Bradburn, CFP®, CWS® • 1st ···
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Really thankful for my partner Stacey Panenhanouvong for helping me spread #financialeducation at the #NewHeroesGala in Santa Monica again this year. I've always appreciated Charles Schwab for allowing us to pursue our passions. Robert Blunt Sr. Carrie Schwab-Pomerantz Karen (Casey) Cortese Liz Rodriguez Doug Wilson Jenna (Naughton) Ferar Santa Monica Chamber of Commerce Fabian Lewkowicz Santa Monica-Malibu Unified School District #SantaMonica #wealthmanagement #financialadvisor #networking #leadership #teamwork #branding

102 Likes · 8 Comments

SNAP FatHeads

Joshua Bradburn, CFP®, CWS® • 1st
VP - Financial Consultant: Helping clients own their tomorrow
7mo

Sometimes I need a bigger head to work in #LA. Thank you Charles Schwab SNAP for the wonderful gift. I've secretly always wanted one. #SantaMonica #finlit #WealthManagement #FinancialPlanning #MoneyMonday #funatwork Fathead Amy Heiss Stacey King Lisa Hunt Katie Leimkuehler Katie Pfledderer Lauren Blaney Stacey Panenhanouvong Robert Blunt Sr.

118 Likes · 15 Comments

- 133 likes/comments
- Conversation starter

Julie Ramirez • 2nd — 7mo
Revenue Specialist at Hilton Corporate in Addison, Tx.
Haha. This is great!
Like Reply | 1 Like · 2 Replies

Joshua Bradburn, CFP®, CWS® • 1st Author — 7mo
VP - Financial Consultant: Helping clients own their tomorrow
Thank You Julie. Hope all is well in Beverly Hills?
Like Reply | 1 Like

Julie Ramirez • 2nd — 7mo
Revenue Specialist at Hilton Corporate in Addison, Tx.
Joshua Bradburn, CFP® yes it is thank you! Very busy summer, but otherwise great!

Reaching Millennials and GenZ, too

- 105 likes/comments

Joshua Bradburn, CFP®, CWS® • 1st
VP - Financial Consultant: Helping clients own their tomorrow
5mo

Who says #Millennials and #GenZ aren't interested in their finances. I've got a crowded house actively engaged. Charles Schwab Cannon Financial Institute CFP Board Financial Planning Association (FPA) University of California, Los Angeles University of Southern California #financialfreedom #financialeducation #wealthmanagement #financialadvisor #moneymatters

92 Likes · 13 Comments

William Trigleth, CWS • 2nd — 5mo
Executive Director Certifications at Cannon Financial Institute

It is great to see a CWS graduate successfully helping prospects and clients improve their lives and at the same time seeing Joshua grow his practice and representing the Charles Schwab brand in such a positive way! Great win for everyone!

Greg Hasty • 2nd — 5mo
Simulation Coordinator at Indiana University Health

We care. I wonder if decades of telling our generation that a social safety net of retirement probably won't exist scared them away from personal retirement plans as well. Good to see this!

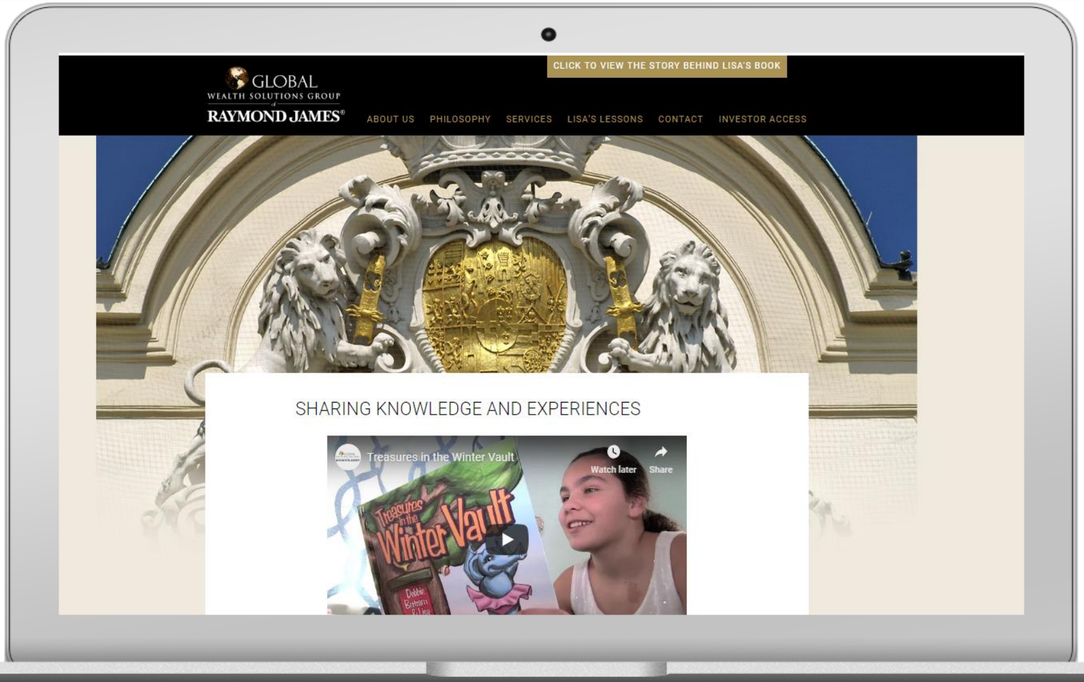
Lisa A. Detanna, AIF®, MBA, WMS®

Senior Vice President, Managing Director

Raymond James


"Treasures In The Winter Vault"
Read by Katharine McPhee & Lilli Bosse


LIVE performance by:
GOODING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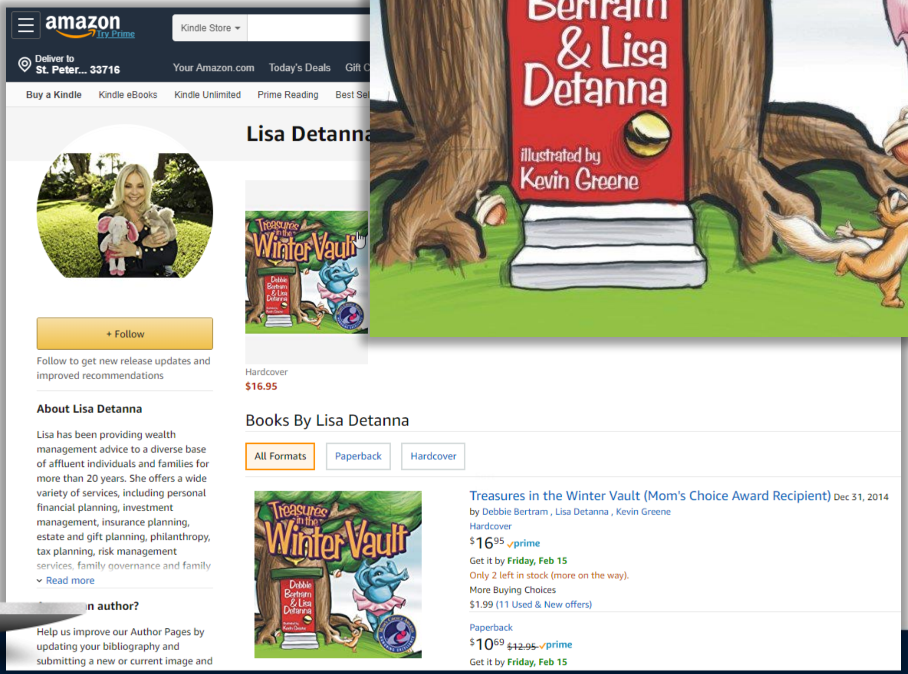
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Lisa has been providing wealth management advice to a diverse base of affluent individuals and families for more than 20 years. She offers a wide variety of services, including personal financial planning, investment management, insurance planning, estate and gift planning, philanthropy, tax planning, risk management
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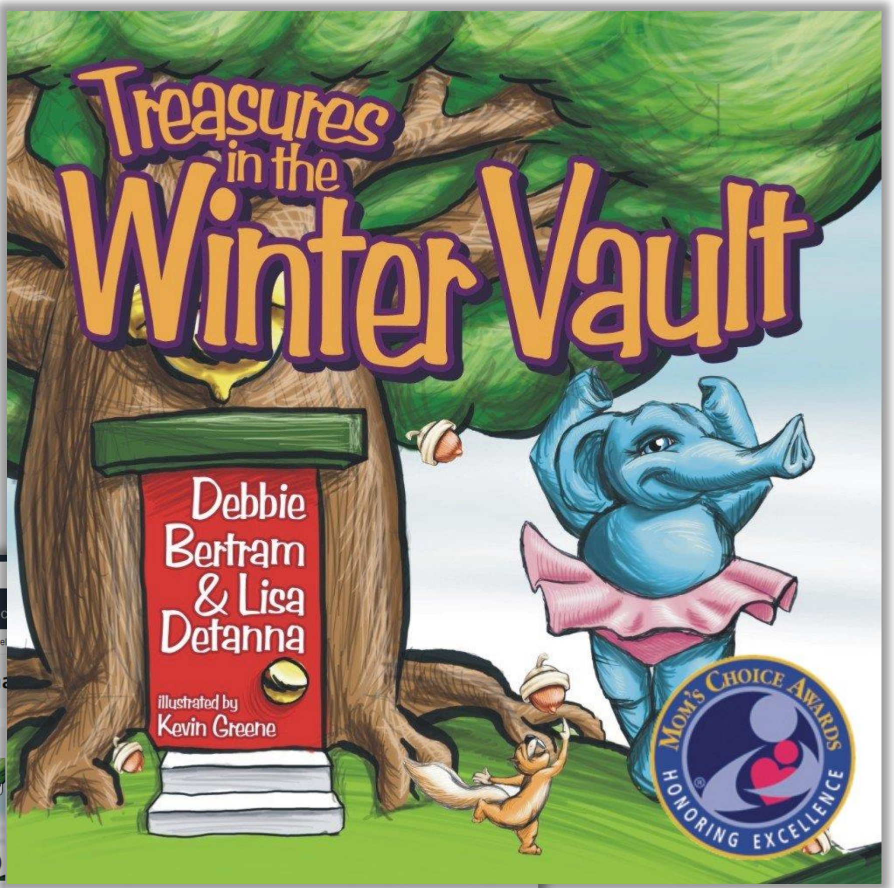
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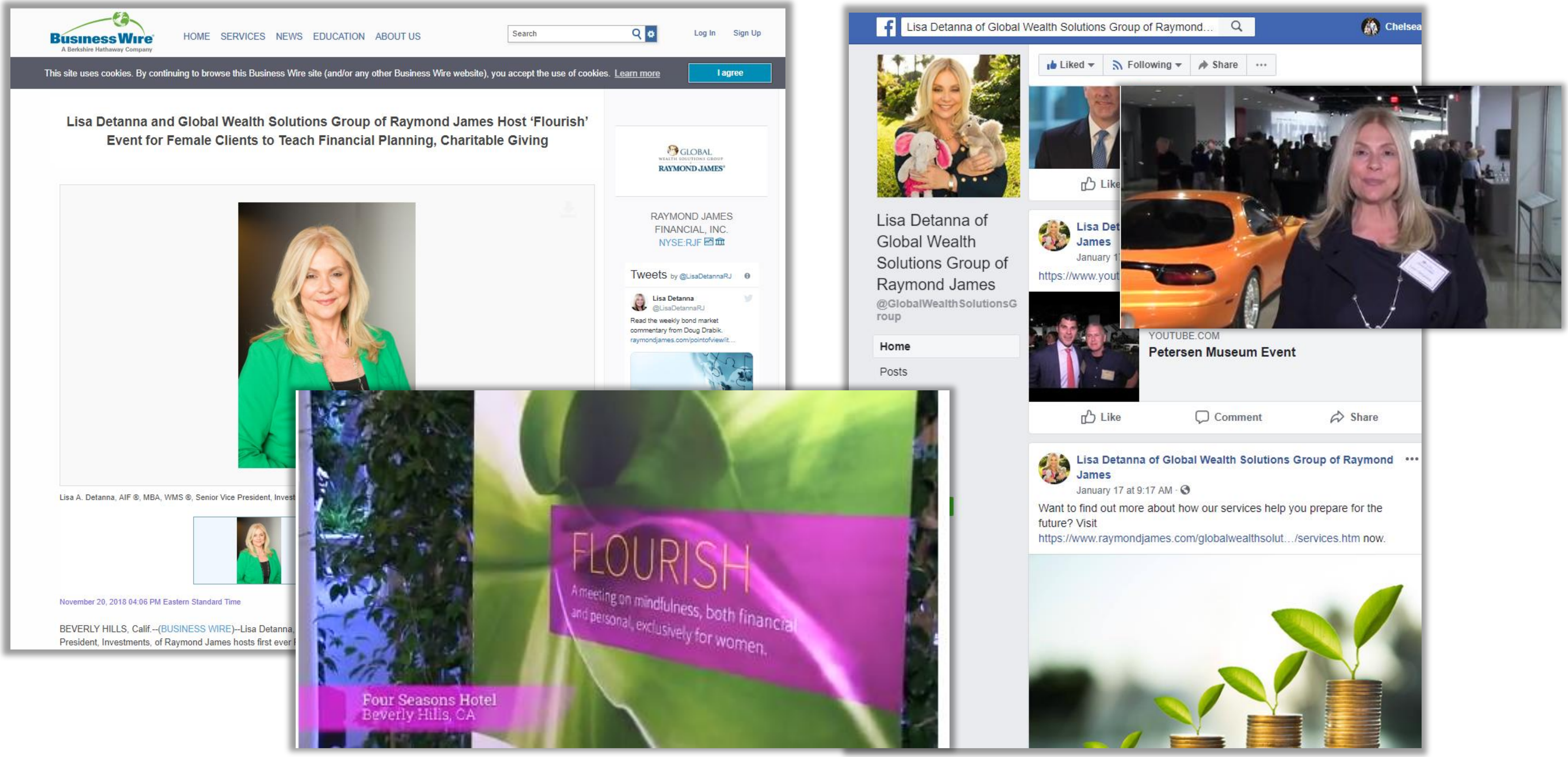
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Lisa A. Detanna, AIF ®, MBA, WMS ®, Senior Vice President, Invest
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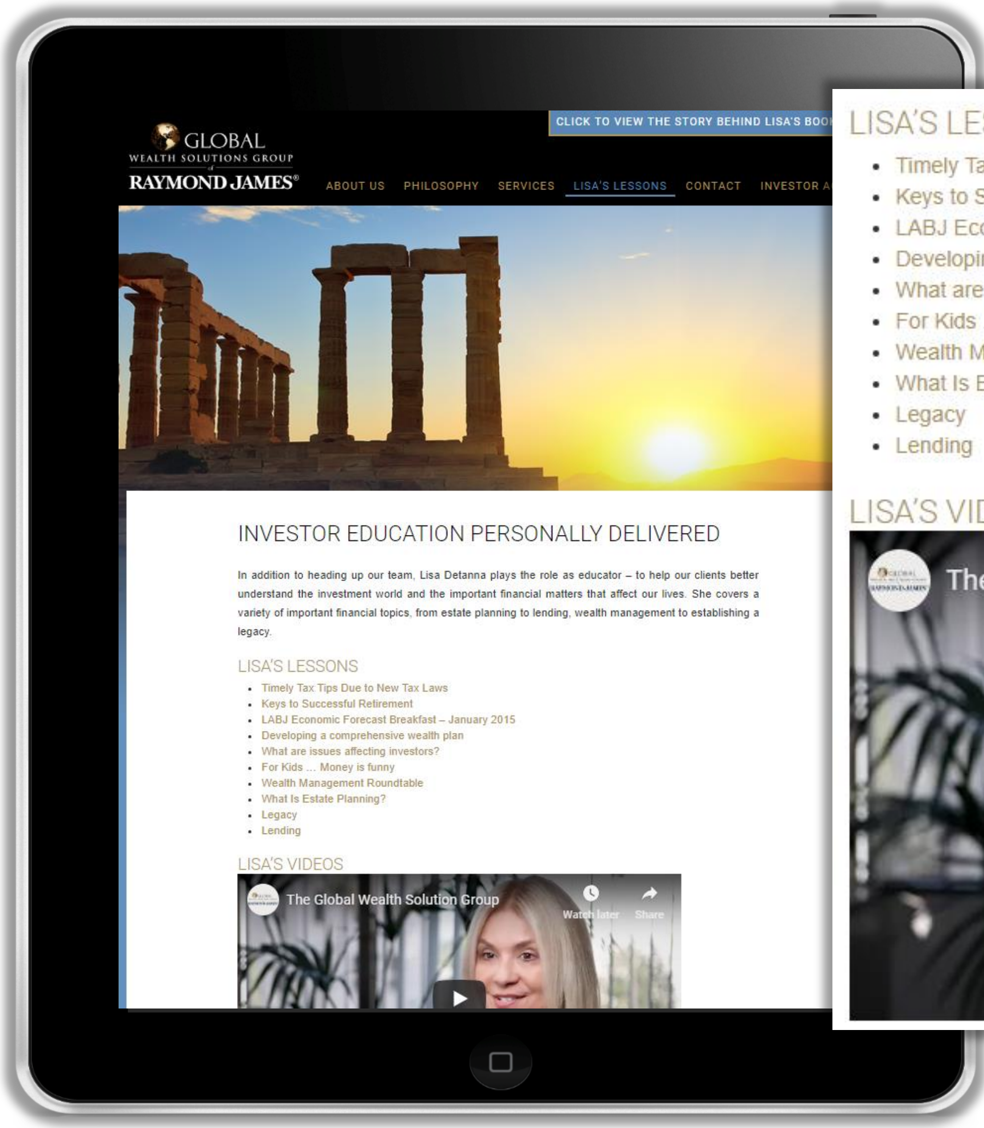
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In addition to heading up our team, Lisa Detanna plays the role as educator – to help our clients better understand the investment world and the important financial matters that affect our lives. She covers a variety of important financial topics, from estate planning to lending, wealth management to establishing a legacy.
LISA'S LESSONS
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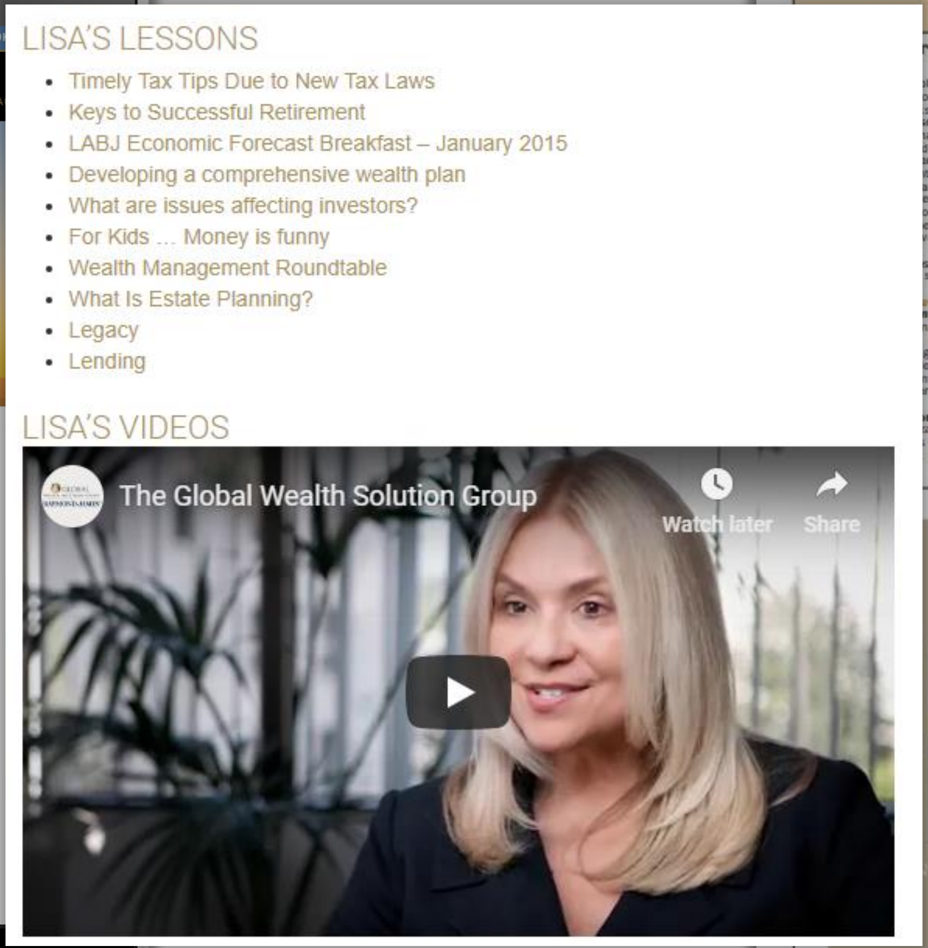
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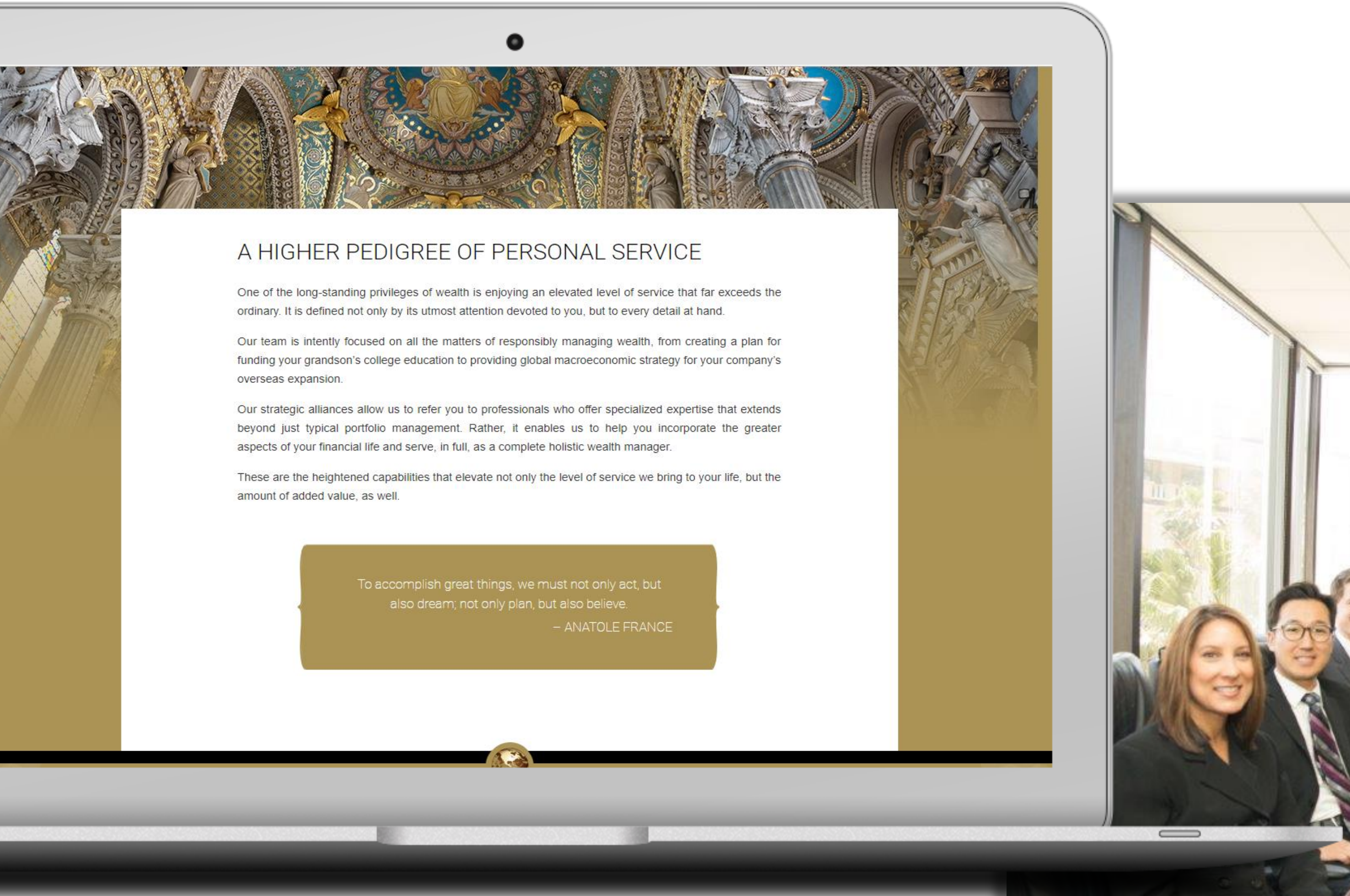
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One of the long-standing privileges of wealth is enjoying an elevated level of service that far exceeds the ordinary. It is defined not only by its utmost attention devoted to you, but to every detail at hand.
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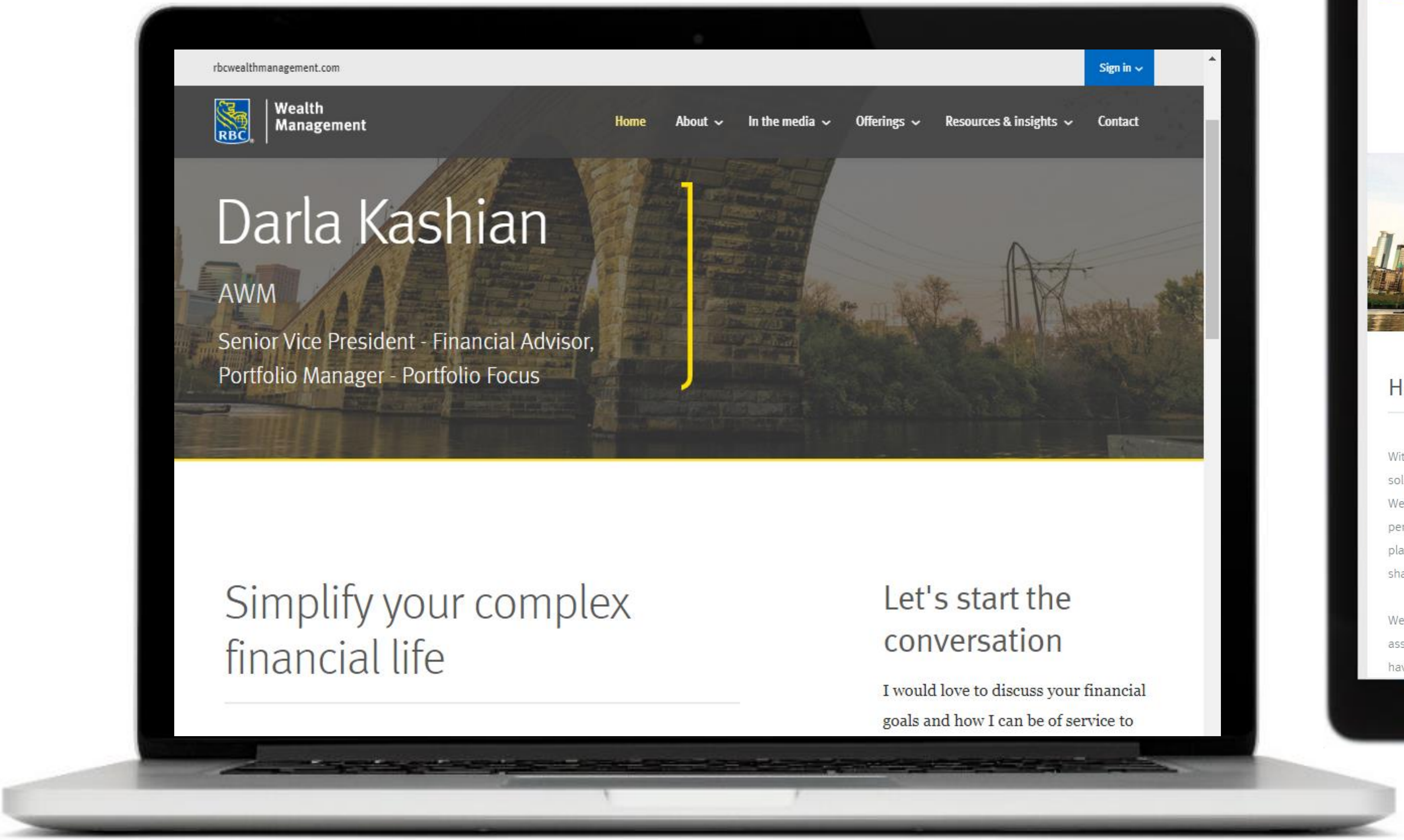
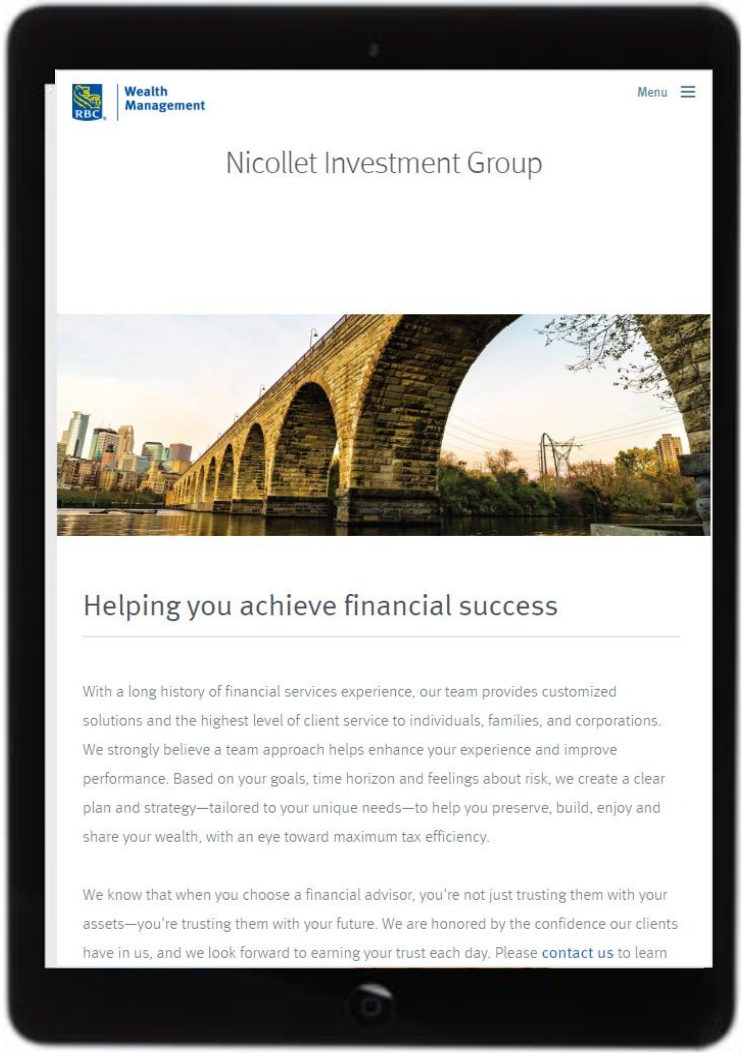
These are the heightened capabilities that elevate not only the level of service we bring to your life, but the amount of added value, as well.
To accomplish great things, we must not only act, but also dream; not only plan, but also believe.
– ANATOLE FRANCE

Darla Kashian

Senior Vice President, Financial Advisor

RBC Wealth Management





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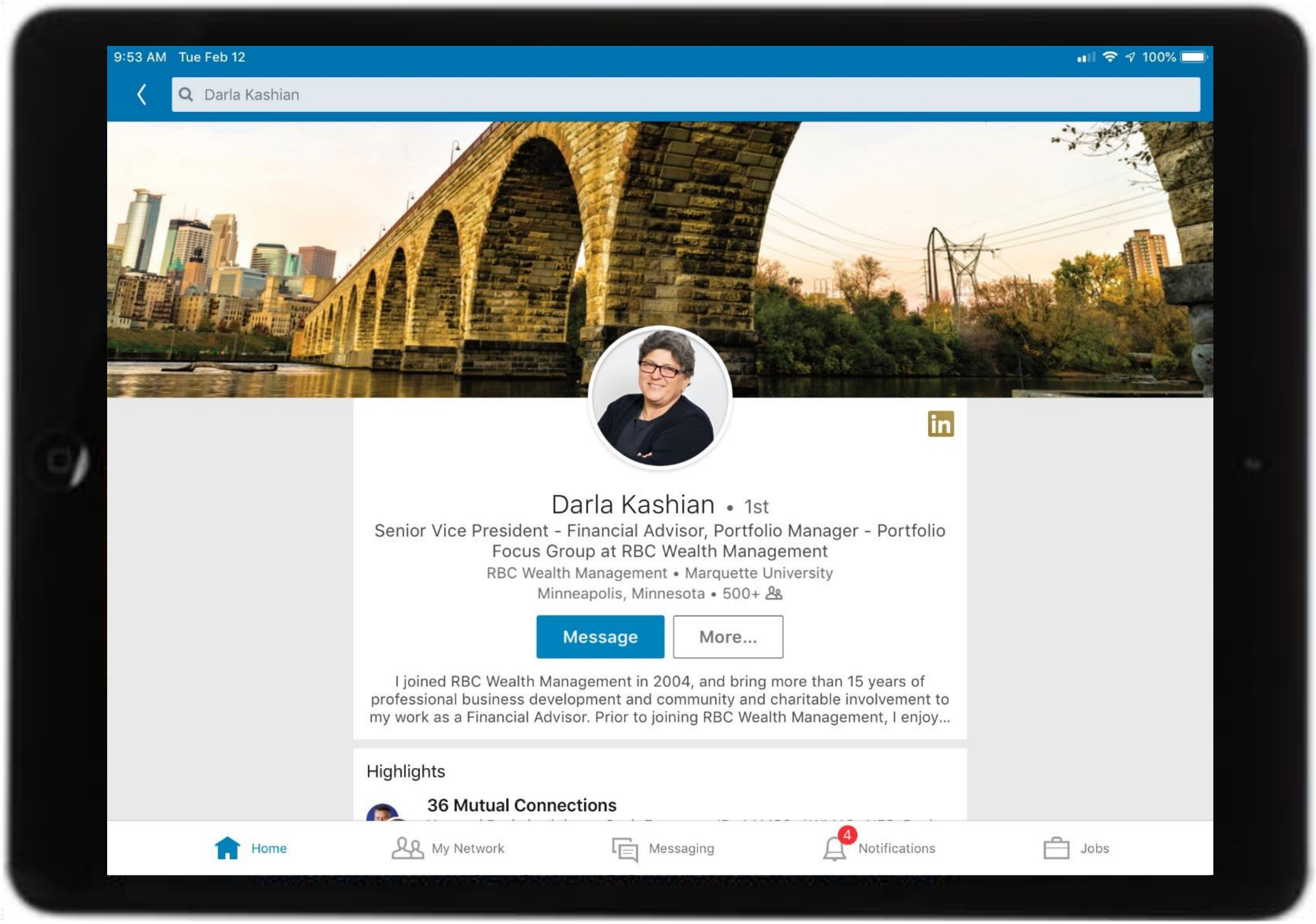

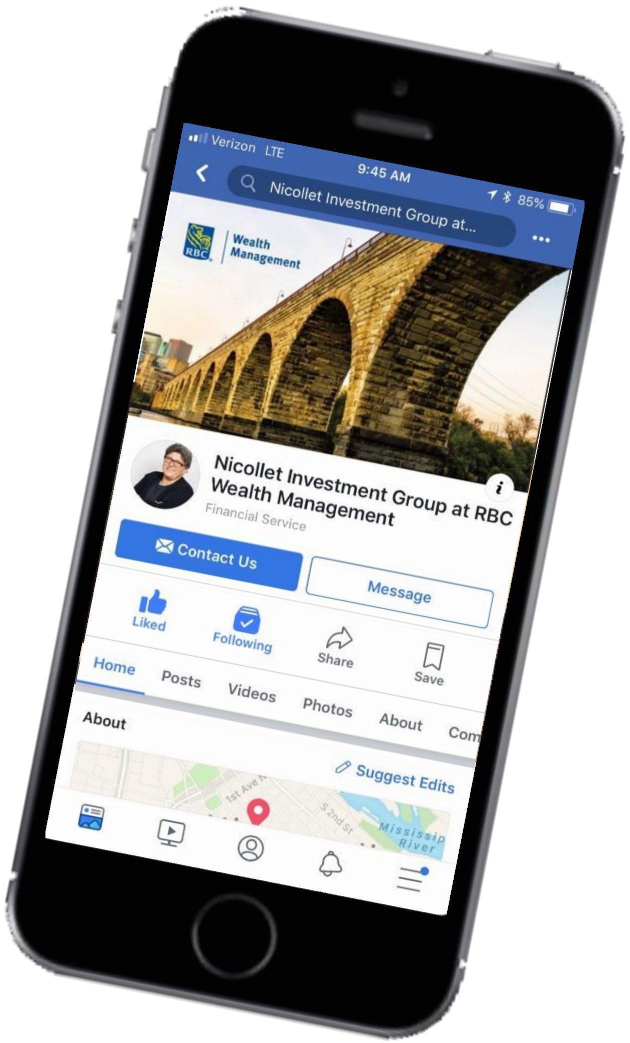

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Nicollet Investment Group at RBC Wealth Management
November 28, 2018

As we express gratitude this holiday season, we are pleased to show our appreciation by supporting the St. Louis Park Emergency Program. STEP directly provides food and clothing to St. Louis Park residents residents in need, as well as advocacy, referrals, and build a collaborative relationship. For more information about STEP, visit their website at http://bitly.com/2SdwbLQ

Nicollet Investment Group at RBC Wealth Management
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Darla Kashian • 1st
Senior Vice President - Financial Advisor, Portfolio Manager - Portfolio Focus Gro...
1yr

It may be hard to imagine a future where you need long-term care, but it's an important—and costly—possibility to consider as you plan for your retirement. Contact me to talk about your RBC WealthPlan.

Plan ahead for potential long-term care expenses - RBC Wealth Management
rbcwealthmanagement.com

8 Likes · 1 Comment

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Add a comment...

Kelly M O'Brien • 2nd · 11mo

This issue has been gnawing at me. Thanks for the reminder.
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My path to RBC

My path to RBC Wealth Management is evidence that our firm values the unique proposition that individuals bring to serving the wealth management needs of families. Watch the video below to hear why we are passionate about our work. If you're inspired, reach out to me and to talk about your path.

Lisa Kranzler-Kent, CRPC®, CIMA®

Senior Vice President

Wealth Manager Advisor/Portfolio Manager

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How Advisors Use Social & Digital Tools At Merrill Lynch

- **Social Media** – business LinkedIn account to share pre-approved content
- **Digital Presence** – websites for every ML advisor or team with curated content
- **Texting** – compliant capability to text clients from business number
- **Mobile Apps** – ability to show clients workstation reports while in the field
- **eCommunications** – systemically email ML content to clients and track usage

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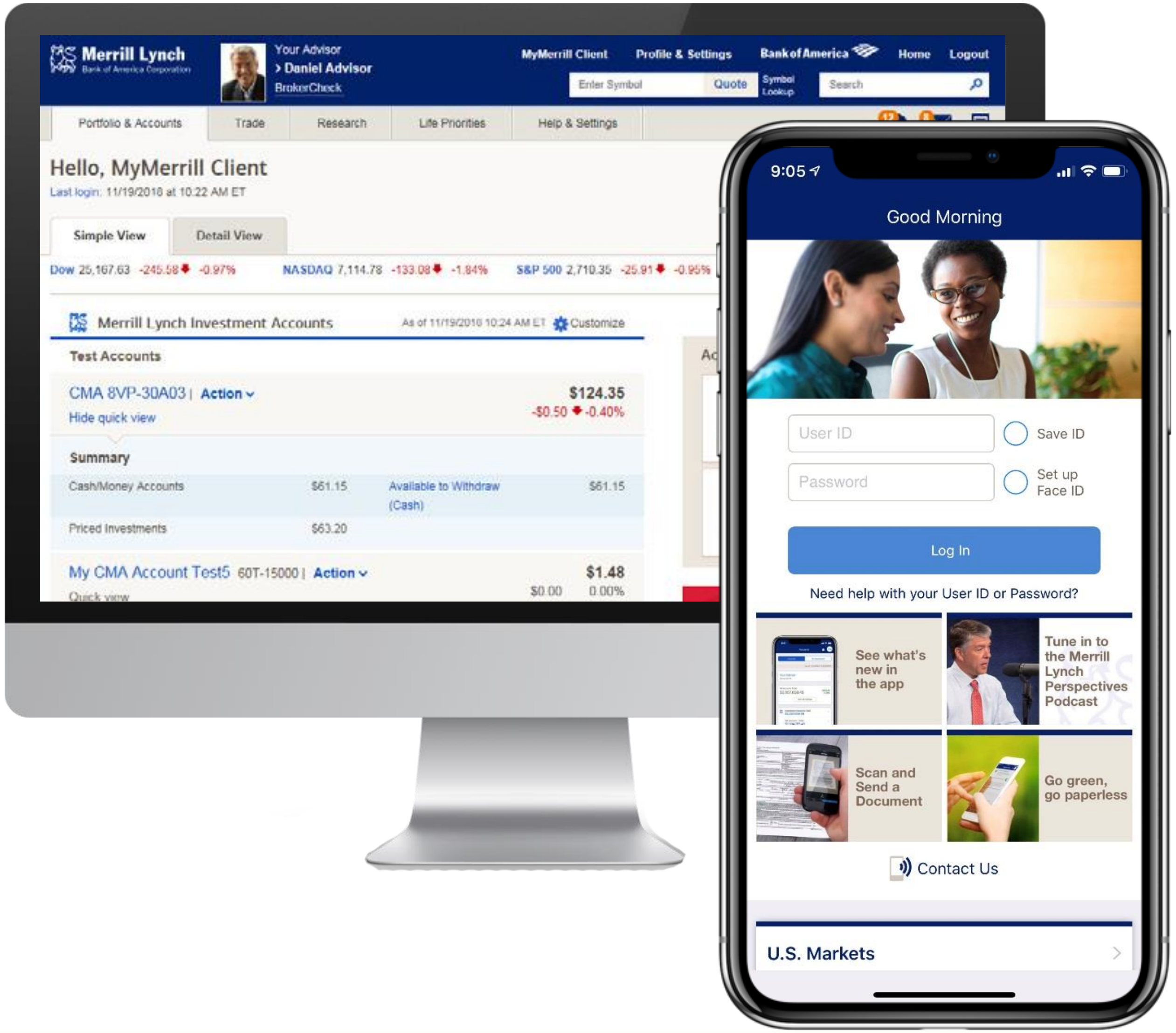
How We Serve Merrill Lynch Clients With Digital Tools



- **Banking Integration** – view all accounts in one place across the enterprise
- **Spending & Cash Flow** – see spending & income across enterprise accounts
- **Mobile Check Deposit** – deposit checks directly to mobile app
- **Doc Scanning** – take picture of documents & send securely to advisor via mobile app
- **Prospect Experience** – sign up for online & mobile app before becoming a client

Meron Yemane, Financial Advisor

Associate Vice President, Family Wealth Advisor
Morgan Stanley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Prepare for Changes this Tax Season | Morgan Stanley
April 15th will be here before you know it. Here's an overview of the latest tax changes and what the new law could mean for your situation.
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While the Fed's signal that it will curtail quantitative tightening sounds like a positive for asset prices, Chief Investment Officer Mike Wilson hears warning signs in the drumbeat of corporate earnings revisions.
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Find people you know
Trends for you · Change
Trump
1.7M Tweets
Whitaker
Acting Attorney General Matt Whitaker tells Rep. Nadler his 'five minutes are up'
#SOTU
Newsweek is Tweeting about this
Nadler
77.5K Tweets
#HouseJudiciaryCommittee
2,055 Tweets
Doug Collins
11.1K Tweets

RockvilleBridgeGrpMS @RockBridgeGrpMS · Jan 30

The coming 'Youth Boom.' How demographic changes could reshape the U.S. economy in coming decades

Morgan Stanley　Logged in as: John A. Fabian

Millennials, Gen Z and the Coming "Youth Boom" Economy

As Gen Z join Millennials in the workforce, the two cohorts could deliver a sizable jolt to U.S. GDP, consumption, wages, and housing—and put the ...

morganstanley.com

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Thinking of going green in the New Year? Here are three decisions you should make before building your portfolio:

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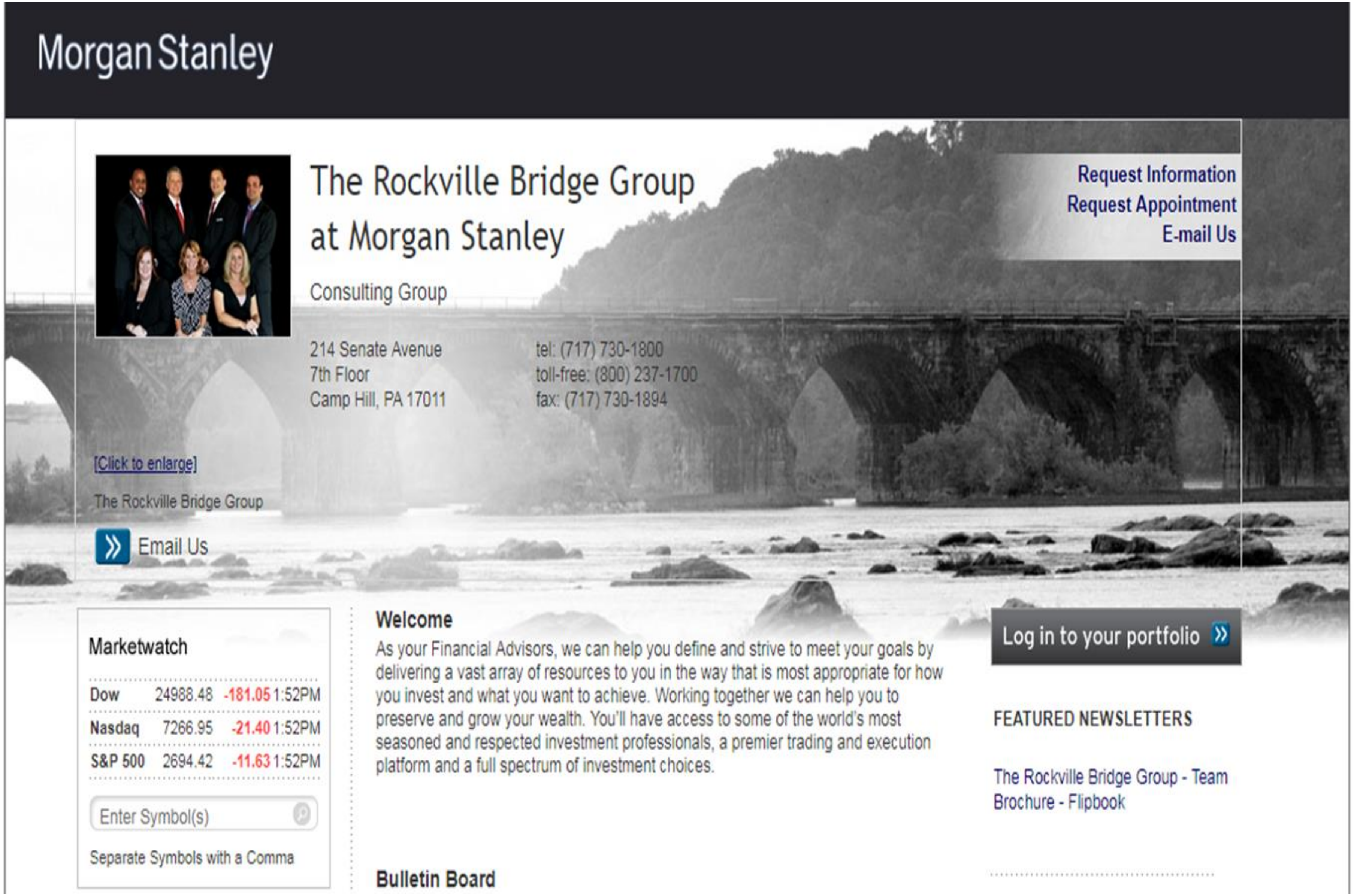
How to Build a Green Investment Portfolio | Morgan Stanley

You can seek to generate positive financial returns while benefiting the environment, but shifting your entire portfolio may take patience.

morganstanley.com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