



Hans Reese

Certified Financial Planner™
Chartered Retirement Planning Counselor™
Accredited Asset Management Specialist™



New Stage Investment Group®

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Common Services

Requested:

- Investment Management
- Financial Planning
- Income from IRA's
- Retirement Planning
- Social Security Strategy
- Long Term Care
- Life Insurance
- Estate Planning
- Investment Tax Advice
- Employer Retirement Plans
- Employer Stock Options
- Financial Coaching



**New Stage Investment Group®
San Mateo, CA Offices**

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- ✓ Over 22 years following a fiduciary focus.
 - ✓ Independent firm connecting you to leading resources.
 - ✓ Transparent cost of service.
 - ✓ Customized services to better help you pursue your goals.
 - ✓ Local. Pro-active. One-on-one guidance.
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Professionally, Hans began his career as a financial advisor in 2001 with Merrill Lynch before being recruited to Morgan Stanley. After several years working with top wealth management teams, Hans successfully launched his own company New Stage Investment Group® to help bay area investors with retirement, financial planning and investment related taxes.

Working as an independent financial advisor, Hans earned the well regarded CERTIFIED FINANCIAL PLANNER™ designation in 2007. As a veteran of two booms, two busts and two recoveries, Hans has first hand experience helping individual clients better navigate the inevitable ups and downs of the markets and meeting their changing financial needs.

Personally, Hans was raised Hawaii before graduating from the University of Colorado, Leeds School of Business. Married for over 20 years with two sons, Hans and his family enjoy visiting friends and family in Hawaii and enjoying the snow and skiing during the winter at Lake Tahoe.

**Call 650-458-0312 or email hans@newstageinvestment.com
www.newstageinvestment.com**

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