

PRESS RELEASE

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## CALLAN CAPITAL MARKS 10-YEAR ANNIVERSARY

*Callan Capital Celebrates 10 Years in Business With Over \$700 Million in Assets Under Management\**

**La Jolla, CA (PR Web) Thursday, January 12, 2017** – Callan Capital, a La Jolla-based independent wealth management firm, today announced its ten-year anniversary and record growth since the firm's inception in 2007.

A celebration of the ten-year anniversary was held at L'Auberge Del Mar in December. Over 110 clients and members of the community gathered to celebrate the milestone.

"We are grateful to our clients for entrusting us as the stewards of their wealth. We are proud of our growth and success thus far and look forward to continued growth in 2017 and beyond," said managing partner Trevor M. Callan, CIMA®, CPWA®.

Core competencies such as fiduciary duty, servicing entrepreneurs and corporate executives, and integrating with trusted advisors still stand today. In 2016, the firm focused on strengthening its technology offering for clients and in 2017, the firm intends to focus on expansion.

### **About Callan Capital**

Callan Capital is La Jolla based wealth management firm specializing in financial planning and asset management services for affluent families, corporate executives and entrepreneurs. Callan Capital's suite of services include financial planning, asset management, executive benefit planning, retirement planning, risk management, tax minimization, estate and trust planning and philanthropic planning. Callan Capital provides clarity, direction and discipline to financial choices clients make everyday. Please visit [www.callancapital.com](http://www.callancapital.com), read our blog at [www.callancapital.com/blog](http://www.callancapital.com/blog), and follow us on Twitter (@callancapital) and LinkedIn (<https://www.linkedin.com/company/callan-capital>).

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*Callan Capital does not provide individual tax or legal advice, nor does it provide financing services. Clients should review planned financial transactions and wealth transfer strategies with their own tax and legal advisors. Callan Capital outsources to lending and financial institutions that directly provide our clients with, securities based financing, residential and commercial financing and cash management services. For more information, please refer to our most recent Form ADV Part 2A which may be found at <http://www.adviserinfo.sec.gov>. This press release is being provided for informational purposes only and is not a solicitation for advisory services or a recommendation to invest in securities. \*Data as of 12.31.16*