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Define Financial Relocates Company Headquarters to Accommodate Growth
San Diego-based Independent Wealth Management Firm Takes up New Office Space in Symphony Towers; Poised to Build Bigger Team



SAN DIEGO—Jan. 27, 2015—[Define Financial](#), a San Diego-based independent, commission-free firm, specializing in financial planning and wealth management, announced today the relocation of its corporate headquarters to Suite 1750 in the Symphony Towers. Located at 750 B Street in San Diego’s financial district, the new office is designed to accommodate growth and enable the company to continue building its team.

Define Financial was launched in June 2014 by Taylor Schulte, CFP® to provide a place for individuals and small business to receive objective, conflict-free financial advice. Schulte founded the company after years of working as a financial advisor at Morgan Stanley and launching the San Diego operations for Beverly Hills Wealth Management.

“We didn’t know if we’d be in a position to be relocating in less than a year’s time, not to mention expanding our office space to more than five times the original size,” said Taylor Schulte, CFP®, CEO of Define Financial. “We are in an exciting growth period and I am personally looking forward to now having the necessary space to continue building our team to better service our clients.”

Define Financial specializes in customized investment solutions, retirement, tax and college planning, charitable giving and insurance, working closely with individuals, families and small businesses in San Diego County and throughout California. The company is known for its progressive approach, personalized solutions to fit varying client needs, and the use of emerging technology to enhance value and lower cost.

About Define Financial

Define Financial is a San Diego-based independent, commission-free boutique firm, specializing in financial planning and wealth management for individuals and small businesses. Founded in

2014 by Taylor Schulte, CFP[®], CEO, Define Financial provides objective, conflict-free advice, and prides itself on its progressive and forward-thinking culture and personal approach. Its comprehensive financial services portfolio includes investment, retirement, tax and college planning, charitable giving and insurance services. For more information, visit: www.definefinancial.com.

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