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Define Financial Founder & CEO Receives 2015 Five Star Wealth Manager Award

Taylor Schulte, CFP® Named One of San Diego's Top Wealth Managers by Five Star Professional



SAN DIEGO—Jan. 20, 2015—[Define Financial](#), a San Diego-based independent, commission-free firm, specializing in financial planning and wealth management, announced today that Five Star Professional awarded Founder and CEO Taylor Schulte, CFP® with the 2015 Five Star Wealth Manager [Award](#). Less than five percent of wealth managers in the San Diego area were selected for this recognition.

The Five Star award recognizes service professionals who provide quality services to their clients. Five Star Professional partnered with *San Diego Magazine* to find wealth managers who satisfy 10 objective eligibility and evaluation criteria that are associated with wealth managers who provide quality services to their clients.

“We launched Define Financial to create a place for individuals and businesses to receive objective financial advice, free of conflicts,” said Schulte. “Whether it’s accumulating wealth, saving for retirement or planning for college, we are here to help clients sleep better at night, knowing they have a sound plan in place. It is truly a privilege to spend my time working with such great San Diego individuals and families, and I am honored to be recognized by Five Star Professional for my work.”

Schulte founded Define Financial in June 2014, after working as a financial advisor at Morgan Stanley and launching the San Diego operations for Beverly Hills Wealth Management. He holds a Bachelor of Science degree in Business Management from the University of Arizona and an Executive Financial Planner Advanced Certificate from San Diego State University.

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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