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Define Financial Founder & CEO Taylor Schulte Named *SD Metro's* '40 Under 40'



SAN DIEGO, Aug. 21, 2015—[Define Financial](#), a San Diego-based commission-free financial planning firm, announced today Founder and CEO Taylor Schulte, CFP® has been included in *SD Metro's* prestigious annual '40 Under 40' list. Now in its sixteenth year, the publication's award spotlights the best and brightest minds of San Diego County.

Based in downtown San Diego, Define Financial is a financial planning firm catering to individuals and small businesses. Schulte founded the company in early 2014, after spending years as a financial advisor at Morgan Stanley and launching the San Diego operations for Beverly Hills Wealth Management. From inception, his vision has been to build a practice where clients can receive objective, conflict-free advice and accomplish their financial goals—whether it's accumulating wealth, planning for retirement, charitable giving and more.

In addition to focusing on company growth and his clients' success, Schulte has been an active community member, currently serving as chairman of the University Club's Golf Committee, as president of the San Diego Chapter of the University of Arizona's Alumni Association, and as a member of the Financial Planning Association (FPA). Passionate about financial literacy and education, Schulte also volunteers as a career guest speaker at his former high school, Cathedral Catholic.

"San Diego is continuously recognized as one of the most progressive cities, with an incredible range of successful young companies and talent," said Schulte. "It's truly an honor to be included in *SD Metro's* prestigious list of local leaders and be part of a group working in and shaping this great city."

Earlier this year, Schulte was honored with 2015 Five Star Wealth Manager Award, a recognition given to less than five percent of wealth managers in San Diego, and the 2015 Metro Mover Award for his contributions to the financial planning profession.

Schulte will be officially honored with the 2015 '40 Under 40' award at *SD Metro's* awards luncheon, held Tuesday, Sept. 22, at the Sheraton on Harbor Island.

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 CEO Taylor Schulte, CFP®, 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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