SPENCER KELLY, AAMS® AND RUSSELL MOHBERG, CFP® PRINCIPALS/OWNERS

REGATTA CAPITAL GROUP
✉ 2321 Rosecrans Ave., Ste. 2225 in El Segundo
☎ 310-725-9102, regattainvest.com

More than a decade ago, this entrepreneur and industrial designer formed the vision for the business they later founded; Spencer and Russell now bring a combined 19 years of financial advisory experience to their boutique wealth management firm. Regatta Capital Group provides unbiased investment advice to high net worth families, entrepreneurs and endowments. The firm is 100% independent. "Through our independent structure and relationship with Fidelity Institutional Wealth Services," Spencer says, "we combine the best of what small and big firms have to offer; Regatta provides the service and expert advice; Fidelity provides the platform and account protection."

WHAT WOULD YOU LIKE POTENTIAL CLIENTS TO KNOW ABOUT YOU?
"Our clients aren't looking for 'Wall Street' – they're tired of big brokerage firms and instead are looking for that family office feeling they can trust. We do not charge commissions and do not make money when we make changes to a portfolio. Our annual advisory fee is our only source of revenue. We are on the same side of the table as our clients - the better they do, the better we do."

WHO IS YOUR TYPICAL CLIENT?
"Our clients are successful small business owners, professionals and retirees. Some come to us from other firms that have dropped the ball on service or performance, and others find us when they realize it's time to hire a professional team to help manage their wealth. They want to make smart decisions about tax strategies and long-term planning. We have tremendous respect for our clients. We know they have worked very hard for their money. Clients do not work with us to get rich quick. Rather, they're here to build significant wealth over time or to preserve and build upon the wealth they have already created."

WHAT IS THE BIGGEST BENEFIT YOUR CLIENTS GAIN FROM WORKING WITH YOU?
"Our families can feel how much we care about them and their success–they know they can trust us; they know we're working hard for them. And they're thankful that we take the time to work with their CPA, banker, attorney, insurance or mortgage advisor to make sure their team is on the same page and working together for their best interest."