

Frank Deptola & Associates, LLC Celebrates 10th Anniversary

Financial Advisory Firm Credits Long-Term Success to the "The Deptola Difference"

ANAHEIM, CA, U.S.A., June 17, 2022 /EINPresswire.com/ -- This week, [Frank Deptola & Associates](#), a nationally recognized financial advisory firm, announced they had reached the milestone anniversary of 10 years in business.

"We couldn't be more proud to celebrate this occasion," says [Frank Deptola](#), President of Frank Deptola & Associates. "This anniversary is further confirmation that we're successfully delivering a superior wealth management experience; one that prioritizes our desire to do right by our clients."

The firm prides itself on consistently giving clients an exceptional experience characterized by strengths that cannot be duplicated by larger "big box" financial firms, including tax-efficient, nimble and flexible portfolios that are constantly monitored, reviewed, and rebalanced.

Known as the "Deptola Difference," this client experience is built upon a daily quest of chasing perfection and knowing, as football coach Vince Lombardi once said, "... we can never attain it. But along the way, we shall catch excellence." This culture of excellence is based on unchanging core values: integrity, innovation, honesty, and trust that serve as the foundation for a sustainable, profitable, and continuously growing organization.

Frank Deptola & Associates pursue their quest for perfection through an award-winning, well-trained, and educationally-focused advisory team that separates them from the crowd within the financial industry.

President Frank Deptola has received the Five Star Wealth Manager award for eight consecutive years, an honor held by less than 1% of other (past) winners. He has completed 36 graduate courses, earning over 100 graduate credit hours in taxation, finance, accounting and business from nationally ranked programs. Frank possesses an M.B.A. degree from the University of Southern California's Marshall School of Business, and an M.S. Taxation degree from the Mihaylo Graduate School of Business, at Cal State Fullerton.





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President Frank Deptola

Principal Jeff Deptola has a B.S. in business with a concentration in finance from Cal State Fullerton and holds his FINRA Series 7 & 66 securities registrations. He continually monitors each client's needs so as their lives and the financial markets change, their portfolios adjust accordingly. Jeff also serves as the client's voice to management, representing their best interests to the company to ensure a top-tier experience.

Client Services and Administration Manager Brian Baldwin was selected by Commonwealth Financial Network (CFN)

as "Staff Member of the Year" in 2021, one of just three people chosen out of approximately 2000 independent advisor offices associated with CFN. Brian holds his FINRA Series 7 & 66 securities registrations and oversees the firm's client onboarding process, participating in client reviews and completing all compliance requirements.

"It's incredibly gratifying to reflect on what our team has accomplished and look toward the future knowing that we have the commitment – and the tools – to offer our clients long-term guidance and stability. Regardless of the market environment, our clients know that we are working proactively to protect them in all market scenarios.", says Brian Baldwin.

For more information on Frank Deptola & Associates, please visit <https://www.deptola.com/>.

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About Frank Deptola & Associates

Frank Deptola & Associates offers fee-based wealth management strategies and retirement plan consultation for individuals, families, and businesses at both a local and national level. The firm, which seeks to provide a sophisticated financial analysis for clients on a wide array of investment products and services aimed at building and protecting their wealth, was founded by Frank Deptola in 2012.

The "Deptola Difference" is defined by three fundamental principles: offering a comprehensive financial approach for clients, providing them individualized guidance, and delivering hands-on, personalized service.

Brian Baldwin

Frank Deptola & Associates

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