

Vistica Wealth Advisors founder Jeff Vistica attends Special Needs Planning Symposium

Jeff Vistica attended and served as an exhibitor at the three-day Special Needs Planning Symposium in Napa, CA, last February 9 to 11, 2023.



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CARLSBAD, CALIFORNIA, UNITED

STATES, February 12, 2023 /EINPresswire.com/ -- Jeff Vistica, the founder of Vistica Wealth Advisors and co-founder of Valiant Partners, joined [Special Needs Planning](#) Symposium to provide a virtual exhibition for fellow attendees and industry professionals.

As a [certified financial advisor in California](#), Vistica has a well-established background in providing unbiased economic advice backed by evidence. His work involves helping clients resolve financial issues to set them up for success. He's also an active member and volunteer for the Financial Planning Association.

Valiant Partners, his latest venture with his father, Dan, and wife, Lily, focuses on providing comprehensive assistance for families with children who require special care. Their services help these families plan for their child's future by maximizing tax opportunities and establishing special needs trusts, among other financial concerns.

Sharing expert industry and personal insights in the symposium is another way for Vistica to help more people succeed in reaching their goals for themselves and their loved ones.

About the Event

The Special Needs Planning Symposium educates attorneys, fiduciaries, and other professionals about comprehensive services for persons with disabilities. Several of America's experts on social needs planning will present critical topics ranging from public benefits to advocating for persons with disabilities.

Kevin Urbatsch, National Director for the Academy of Special Needs Planners, will serve as the symposium's host. Meanwhile, Michele Fuller, awarded the "Special Needs Attorney of the Year" by Women in Law in 2016, will present the program.

The symposium took place Meritage Resort and Spa in Napa, CA, from February 9 to 11. Attendees are joined in person to network with fellow professionals and enjoy Napa's local food and wine. Otherwise, virtual attendance for all sessions is also available.

The event's premier sponsors include Phillips Bonding & Insurance Agency, Inc., Andrew De Vries, MBA, Merrill-Special Needs Team, True Link Financial, and Prudent Investors. Know more about the event [here](#).

About Vistica Wealth & Valiant Partners

Vistica Wealth & Valiant Partners is an independent wealth management firm providing clients with recommendations that best suit their clients' interests. Composed of financial experts, their evidence-based advisors offer them sound financial advice to achieve short and long-term goals

Through a combination of emotional and intelligence quotient, the firm aims to help clients build a more secure financial future. [Schedule a consultation](#) today to know more about what they do and how they can help you.

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