

Asset Preservation Strategies Evolves with New Office Location and Elevated Service Offering

Serving clientele for over 26 years, Asset Preservation Strategies kicked off the New Year with a bold vision

SAN DIEGO, CA, UNITED STATES, February 5, 2026 /EINPresswire.com/ -- [Asset Preservation Strategies](#) is known for their financial planning and wealth management solutions that are designed to support multi-generational families, ultra-high net worth individuals, business owners and executives who desire a modern, collaborative approach. Relocating into their new headquarters just before the New Year, the tenured team of professionals has continued to grow as the firm serves more discerning clientele with their signature approach. Paving the way forward through strategic leadership, Asset Preservation Strategies is led by CEO and Senior Financial Adviser Greg Banner and President and Senior Financial Adviser Monica Szakos.



Asset Preservation Strategies Team



Collaborative Wealth Management

Greg Banner is known for his results which are curated through his collaborative work with ultra-high-net-worth individuals, entrepreneurs, and business owners. Respected for his precision planning and creative tax planning strategies, he has developed a niche in working with real estate developers, and with private equity and alternative investments to create varied tax-efficient strategies. With 39 years of experience that has positioned him in high profile speaking engagements for organizations such as Marcus Evans, IMN Real Estate Family Office, Business Enterprise Institute, Exit Planning Institute, Southern California Institute, Founders Group, and

Laureate Wealth Strategies, Greg has cultivated a following that values his foresight. As the CEO and a Senior Adviser at Asset Preservation Strategies, Greg is sought out by clientele who desire his extensive knowledge and resources for navigating complex wealth building, intricate financial portfolios and tax mitigation.

Earning the trust of valued clientele through her relentless attention to detail, Monica Szakos is a multi-generational voice in a league of her own in the wealth management industry. Navigating the investment seasons of ebbs and flows with grace and agility, Monica has earned the respect of clientele and peers who value her service-first approach that is paired with smart strategy. Poised under pressure, Monica's strategic leadership has been the backbone of Asset Preservation Strategies. Leading the company into a new era, Monica's meticulous nature and approachability have proven to be vital parts of the team collective at the firm. Additionally, Monica's steadfast commitment to curating optimal outcomes for her clientele has resulted in long-term relationships with those she serves, which in many cases spans several generations within families.

Navigating tax strategies is top of mind for many as we move into tax season. From the looming possibility of California's Wealth Tax to tax-smart planned giving strategies, to the latest tax responsibilities for self-employed workers, Asset Preservation Strategies is helping more clientele map out strategic solutions that are impactful now and into the future. If you are interested in learning more, connect with the Asset Preservation Team [HERE](#) to schedule your consultation.

About Asset Preservation Strategies, Inc.:

Asset Preservation Strategies offers collaborative wealth management for affluent individuals and families. For nearly 30 years, their team of experienced financial advisors has specialized in working closely with affluent individuals and families to create customized client portfolios, incorporating sophisticated tax planning and advanced estate planning strategies, in careful collaboration with each professional that plays a part in handling the client's finances. As fiduciaries, the team at APS is not only required by law to keep clients' interests first, but their passion and primary goal is to advance responsible stewardship of assets and achieve the best possible outcome for each client.

Investment Advice is offered through Belpointe Asset Management, LLC, 500 Damonte Ranch Parkway, Building 700, Unit 700, Reno, NV 89521. Additional information about Belpointe Asset Management is available on the SEC's website at www.adviserinfo.sec.gov. It is important to read our disclosures available at: <https://belpointeasset.com/disclosures>

Paula Steurer
Sterling Public Relations
[email us here](#)

Visit us on social media:
[LinkedIn](#)

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