



DIAZO

FINANCIAL INDEPENDENCE  
BY DESIGN™

DIAZO

CONCIERGE

SERVICES BROCHURE

---

*Our advice business is not about selling – it's about serving.*

# About **Diazo Wealth**

Diazo exists to improve the financial well-being of our clients, taking what most people consider the greatest stress in their lives and relieving that pressure with a consistent blueprint to achieve financial independence.

Our advisors integrate your challenges, aspirations, and objectives so that we can construct a durable foundation. Together, we use those plans to transform your goals into reality. Your goals and vision guide our process every step of the way, allowing you to live the life you've always dreamed of — starting today.

As a boutique firm offering concierge services, we believe that financial planning isn't transactional – it's relational. At Diazo, we build wealth by building deep relationships with our clients. We create authentic connections by getting to know you and your family – and that includes helping your children and grandchildren become good stewards of wealth.

We know that one size does not fit all. The success of our clients derives from understanding the unique details of your situation and planning accordingly. We provide services and support with that in mind.

We encourage clients to reach out to their advisor regarding anything that involves a dollar- or percent-sign. That belief is why we've designed the suite of concierge services we offer to clients – essentially a "one-stop shop" for all of your financial wellness needs.

## Planning-Aligned **Partnerships**



**Trust & Will Services** – Review of existing documents, creation & customization, estate planning, etc.



**Charitable Giving Strategies** – Due diligence, tax planning, creation of customized plans, etc.



**CPA Services** – Tax preparation and filing, optimization strategies, accounting services, etc.



**Mortgage Consulting** – Pre-approval, rate analysis, refinance, debt consolidation, etc.



**Insurance** – Individual & Group Medical, Home, Auto, Life, Boat, Commercial, Medicare, etc.



**Real Estate Services** – Property management, commercial analysis, negotiation & contract review, etc.

Experience our exceptionally-curated network of trusted partners – all of whom we have vetted and trust to provide the premium customer service our clients deserve and come to expect – and you'll find advice is our specialty.

# Lifestyle & Wellness Services

Our partnerships are not established in profit sharing – just shared ownership of your success.

---

*As a Diazo client, you have access to expert resources to help you manage life's big financial decisions. Need to buy or sell a car or boat? Evaluating a project? Need to hire nursing help? Our project managers are here to help remove roadblocks and get things done right.*

## HOME SERVICES **1.**

---

*Home Renovations & Projects, Solar Power Consultation & Installation Services, Home Theater Installation, Vendor Selection & Project Management, Quality Control & Progress Monitoring, Budgeting & Cost Analysis*

## **2.** BUSINESS CONSULTING

---

*Employment & Recruiter Services, Entity Formation, Business Exit Consultation, Medical Practice Consulting, Succession Planning, Family Business Transition Planning, Estate Planning for Business Owners*

## LIFESTYLE & WELLNESS **3.**

---

*Car Negotiating Services, Assisted Living Facility Due Diligence, Medicare Consulting, Travel Planning, Nutrition & Fitness Coaching, Technology Purchasing Assistance, Relocation Services, Education Consultancy*

## **4.** MULTIFARIOUS INQUIRIES

---

*Life can throw some interesting situations at you. If you need assistance and don't know where to start, start with us. If we can't help you, chances are we know someone who can.*

*For a comprehensive list of our concierge services, please visit [diazo.com/concierge-services](https://diazo.com/concierge-services).*



# DI A Z O

FINANCIAL INDEPENDENCE  
BY DESIGN™

## CONTACT US



702.745.1800



info@diazowealth.com



www.diazowealth.com



2518 Anthem Village Dr, Suite 104



Henderson, NV 89052

*Diazo, LLC is a Registered Investment Advisor that conducts business only in states where it is properly registered or is excluded from registration requirements.*