

Planning the Future & Guiding Success

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HERE IS ONE RULE LEADING THE HEARTS AND WORK CULTURE OF THE PEOPLE AT PACIFIC CAPITAL INVESTMENTS: **TREAT OTHERS AS YOU WOULD LIKE TO BE TREATED.** It is a mantra that is lived and breathed daily. Honoring the Golden Rule guides their professional and personal decisions and allows this team

of financial advisors to navigate through any obstacles faced in pursuit of a client's financial security.

"Clients want to know three things," explains Owen Yamamura, CEO and President of Pacific Capital Investments (PCI). "Can I trust you? Are you competent? And do you care about me? Everything we do revolves around these important core values—whether it's transparency of costs or client recommendations, to regular involvement in increasing our knowledge-base and leveraging technology, or simply taking the time to listen to a client share their

personal highs and lows of the past several weeks. It matters to us and it matters to clients."

With a disciplined investment strategy and a comprehensive planning-based approach, the PCI team helps clients to understand where they are today and what are the next steps needed to realize their financial goals. Always going above and beyond, the PCI team facilitates meaningful collaboration with their clients' attorneys, CPAs and other trusted advisors to ensure all strategies are coordinated and up-to-date. Yamamura and his team's industry knowledge, keen insight into today's evolving markets, and acquisition of advanced professional certifications allows them to initiate best practices while affording true peace-of-mind for their clients.

He attributes the company's 19 years of longevity and success to his unyielding faith in Jesus Christ and the amazing people who surround him—the support of his loving wife and the leadership of his PCI team.

Committed to helping people outside of the office as well, Yamamura and the PCI team use their own knowledge and experience to empower others in the community. Recently, PCI launched a college scholarship fund and mentorship program, in partnership with a local high school, that provides guidance and opportunity to at-risk students to help them overcome personal and academic challenges. "Just as we

have been blessed as a company we believe it is our responsibility to be a blessing to others," he says. "Just as others have poured into us with their time and advice, we enjoy investing into the next generation and teaching them the skills and principles that have helped us."

Owen Yamamura is a Financial Advisor offering securities through First Allied Securities, Inc. a Registered Broker/Dealer Member FINRA/ SIPC and advisory services through First Allied Advisory Services, Inc., a Registered Investment Adviser



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