Individual Profile

PACIFIC ADVISORS™

Bradly Stevens CLU® ChFC® LUTCF

Financial Advisor

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Specialty: Long-term financial services for families and owners of closely-held businesses; Coordinating protection, assets, liabilities, and cash flow strategies. The Living Balance Sheet ®.

Our Strategic Approach

As your financial professionals, our first job is to help you protect your current position. Then we work with you to create a roadmap for the achievement and protection of your full vision.

We focus on your unique needs and design customized strategies to help meet those needs. Once the plan is clear, we begin to conservatively advance toward it, never taking more risk than necessary to achieve the fulfillment of your narrative.

Our Financial Services

Specializing in Estate Planning, Charitable Planning, and Retirement Planning for executives, professionals, and small business owners.

Our Business Services

Employee Benefits, Executive Benefit Planning, Key Person Planning, Qualified Retirement Plans, Deferred Compensation Planning & Buy/Sell and Buy-Out Planning.

Our Insurance Services

Life Insurance, Disability Insurance, Long-Term Care Insurance, & Group Health Insurance.

For doctors and dentists who are concerned with their financial future, Bradly has the unique knowledge to handle all aspects of the financial planning process. His firm is a full service financial planning firm. Their products and services help his medical and dental clients protect first, fully and forever. He is a cash management specialist specializing in everything from asset protection to student loan repayment strategies. Unlike his competition who focuses on meetings needs by using a lot of assumptions and guesses for your financial plan, Bradly focuses on your current cash flow and putting every dollar to its highest and best use. He has unique experience dealing with doctors, dentists and their finances and because of that he has the knowledge you can benefit from that others are unable to offer.

Bradly was born and raised Anaheim, CA. He is a member of the organization MD Pref erred Physician Services and received their Excellence in Service to the Medical Community Award in 2011, 2012, 2013, 2014 and 2015. He currently lives in Moreno Valley, CA with his wife and five children. He is active in his community as a former District Chair for the Professionals in Human Resources Association District 11, a former board member at large for Pick Riverside, a member of the Riverside Chamber of Commerce, former volunteer firefighter for Riverside County, little league manager and a mentor for young professionals. Bradly possesses a Bachelor's Degree in Finance and an MBA from the University of Phoenix. His experience in the financial industry dates back to January of 2003. His professional licenses include a California Life and Health Insurance license and FINRA Series 7, 6, 63, and 65 licenses. He is a Registered Investment Advisor, Life Underwriter Training Council Fellow, Chartered Life Underwriter and Chartered Financial Consultant.

PATH OF CONFIDENCE™

A Good Life for the Rest of Your Life™

At the end of the day, each of us is doing our best to live a good life. While money is no assurance of a good life, not having enough money for lifelong financial success certainly threatens it. At Pacific Advisors, we take decades of collective knowledge coupled with a proven process to help you and your family craft a plan of action for financially producing and supporting a good life for the rest of your life. We call this plan your Path of Confidence™.

First we listen to your unique vision for a good life and what is important to you. Then we guide you through a financial decision making process across three distinct strategies: Protection, Sufficiency, and Surplus – Protection to plan for the unexpected; Sufficiency to plan for the expected, and Surplus to plan for more than you expected.

CONFIDENCE BEGINS WITH ORGANIZATION

Get Financially Organized, Make Better Decisions

The Living Balance Sheet®

Many people take a compartmentalized approach to making financial decisions, treating each decision separately as if it had no effect on other areas of their finances.

The result? They end up with strategies at odds with one another and fail to create a positive overall impact.

At Pacific Advisors, we use The Living Balance Sheet®[1] to help coordinate your financial reports in order to gain more effective insights to your decisions and strategies. Your financial data is regularly updated so you always know where you stand.

[1] The Living Balance Sheet® is Guardian's electronic wealth organizational platform designed to help you take appropriate actions to achieve your desired results. The Living Balance Sheet® displays the financial holdings identified by the client based on information and valuations provided directly by the client or by electronic feeds from the client's financial institutions. Valuations provided by electronic feeds reflect the most current information provided by the financial institution as of the date and time noted, but can reflect valuations from an earlier date and time noted. The Living Balance Sheet® and The Living Balance Sheet® Logo are registered service marks of The Guardian Life Insurance Company of America (Guardian), New York, NY.