

Silicon Valley-Based Westridge Wealth Strategies Partners with DFPG Investments

DFPG Investments, Inc., a dually-registered independent broker-dealer and Registered Investment Advisor, is pleased to announce that Westridge Wealth Strategies has affiliated with their firm.

Palo Alto, California-based Westridge Wealth Strategies was founded and is operated by Robert M. Cheney, CFA, CFP.

“Rob has built an impressive wealth management practice,” stated DFPG Investments CEO, Mike Bendix. At the core of Westridge Wealth Strategies is a focus on creating long-term, comprehensive financial plans that include critical tax strategies. Cheney is regularly featured in financial media and works with Silicon Valley business owners and technology employees.

“Westridge Wealth Strategies is a great fit at DFPG,” Bendix continues. “Rob and his clients were not only seeking a broker-dealer platform with a high level of sophistication in private, alternative investments, but they also wanted a compelling RIA platform. This unique combination is at the heart of what we’re doing at DFPG.”

DFPG was recently added to Inc. Magazine’s Inc. 5000 List. The firm was also recognized by both Utah Business magazine and MountainWest Capital Network (MWCN) as one of the fastest-growing companies in Utah.

Cheney says that he reviewed numerous broker-dealers throughout the country when he started exploring his options. “I was seeking a broker-dealer partner that was aligned with my investment philosophy of low-cost, passive-based core portfolio management supplemented with select private, alternative assets,” he said.

Cheney continues, “DFPG has deep resources in syndicated real estate and 1031 exchange solutions, which are valuable tools for my California clients. I look forward to the partnership synergies that DFPG and I will create for my clients.”

For more information about DFPG, including media inquiries, please contact Nick Hansen (nhansen@dfpg.com). For more information about Westridge Wealth Strategies, please see www.westridgewealth.com or contact info@westridgewealth.com

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