

CFP Board



FPA



TD Ameritrade Institutional



TD Ameritrade, Inc. is the firm that we use to custody our client assets. TD Ameritrade, Twin Peaks Wealth Management, LLC and the other entities named on this site are separate and unaffiliated firms, and are not responsible for each other's services or policies. TD Ameritrade does not endorse or recommend any advisor and the use of the TD Ameritrade logo does not represent the endorsement or recommendation of any advisor. Brokerage services provided by TD Ameritrade Institutional, Division of TD Ameritrade, Inc., member FINRA/SIPC/NFA. TD Ameritrade is a trademark jointly owned by TD Ameritrade IP Company, Inc. and The Toronto-Dominion Bank. Used with permission.