

A Holistic Approach to Financial Planning

Herrmann & Cooke Wealth Management

If you're looking for a Registered Investment Advisor to be a fiduciary who truly understands your needs and requirements, no matter your background or life experience, look no further than Herrmann & Cooke Wealth Management.

"What really makes us unique in our business is our varied backgrounds," says Jason M. Cooke, CFP®, president of the Danville, California-based firm. "We live in an area that is very eclectic, but in our business, it's unusual to find that reflected in a firm's advisors and planners. We have a variety in the people who work here that encompasses a lot of different walks of life, and we can offer our perspectives on life to help you develop a financial plan."

"Yes, we are financial planners, but we encourage a holistic plan, not only from the perspective of retirement and estate planning but also with regard to health and wellness and charitable giving."
– Jason M. Cooke, CFP®

Cooke, who has been with the firm for 20 years, specializes in advising clients on strategic planning issues, including portfolio management and diversification, retirement planning, income tax strategies and estate planning.

David P. Herrmann, CFP®, chief executive officer, brings even more experience. He founded the firm more than 33 years ago. He specializes in



The Herrmann & Cooke Wealth Management team

retirement and estate planning, portfolio management and risk management.

Kerry L. Davis, CFP®, leads the firm's investment committee. She has 27 years' experience in financial services, 17 of them at Herrmann & Cooke. She specializes in portfolio analysis, retirement planning, asset allocation, investment policy development, investment research and compliance.

Together, the three financial professionals bring more than 80 years of experience to the table.

"We've advised clients facing every possible life event, so we're confident we can help people create a plan that reflects their unique hopes and dreams," says Cooke. "We specialize in understanding each person's needs and goals. We'll spend time learning about their family, career, business, investment experience, retirement plans and any special needs they may have."

Community Involvement and Charitable Work

In addition to assisting clients, the employees of Herrmann & Cooke are also heavily involved in helping the surrounding community.

Herrmann has served on the boards of local organizations and as an elder and a deacon at Community Presbyterian Church in Danville. Davis has volunteered on various school, sports and church-related boards and committees. Cooke, an

avid runner, marathoner and iron man competitor, coaches Saint Mary's CYO cross-country team in the fall.

For the past four years the firm has been the main sponsor of the Devil Mountain Run, held every year on the first Sunday in May. The 5k and 10k event through the streets of downtown Danville benefits the Discovery Counseling Center of the San Ramon Valley, a community-based nonprofit organization dedicated to enhancing the well-being and quality of life of individuals and families in the greater San Ramon Valley.

Herrmann and Cooke believe their firm's sponsorship of the run sets an example for the firm's approach to helping clients build well-rounded life plans.

"Yes, we are financial planners, but we encourage a holistic plan, not only from the perspective of retirement and estate planning but also with regard to health and wellness and charitable giving," says Cooke.



HERRMANN & COOKE
WEALTH MANAGEMENT

370 Diablo Road, Suite 201 | Danville, CA 94526 | 800-434-6837 | herrmanncooke.com