



WMBC Recognized by the Orange County Business Journal for Excellence in Entrepreneurship

WMBC's Founder Scott Coles, alongside COO David Coles and Creative Strategist Evan Coles, were among the OCBJ 2019 Nominees for Excellence in Entrepreneurship

LAKE FOREST, CA, USA, April 2, 2019 /EINPresswire.com/ -- [WMBC](#) was among the distinguished line-up of men and women who were recognized for their Excellence in Entrepreneurship by the Orange County Business Journal. Raising the bar in the wealth management industry, the Coles are proud to be on the forefront of a movement to ignite change. As one of the leading wealth management firms in Orange County, WMBC is sought out by clientele who are ready to break the cycle of more, and crave financial planning that is tailored to their humanized needs, goals and lifestyle choices. They are also proud to be respected as experts by their industry peers, and enjoy mentoring generations of wealth advisors who desire to offer more value to the clientele they are privileged to serve.



Human Centric Wealth Planning was developed to bring balance to the lives of clientele at all stages of life. The process begins with the creation of a Well-being Profile which covers various aspects of the client's well-being including social relationships, work-life balance, emotions and more. The Well-being Profile reveals the parts of a client's well-being that are flourishing and those that may be suffering; allowing the client to identify and prioritize which parts they want to focus on in their Human Centric Wealth Plan. Then together, the team at WMBC and each client create a plan that is designed to yield greater harmony, complete with the financial systems to support it.

"I speak for all three of us when I say that this honor was truly special as it's a direct result of our innovative Human Centric Wealth planning process that we've developed to help men and women live their best lives now – not just in retirement." –Scott Coles, Founder of WMBC

About WMBC:

WMBC was founded by Scott Coles who holds designations as a Charter Financial Consultant (ChFC) and Chartered Life Underwriter (CLU), with nearly forty years of experience in the

financial planning, wealth management and life insurance industries. Curating a team of industry leading professionals, WMBC offers wealth planning, portfolio management and business consulting. Their mission is to help individuals and families use wealth as a tool to help promote well-being. Through their signature planning process, they are able to create wealth plans that are efficient in promoting well-being, with four metrics utilized to measure and track success: Net Worth, Risk Number, Wealth Index Number and Well-Being Number. For more information, please visit: <https://wmbc.financial/wealth-planning/>.

Learn More:

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