Lund Financial Management

Financial stability and security for financial independence

"Lund Financial Management is built on personal service, proven guidance, and strategies tailored to each client's goals," says Jason R. Lund, Wealth Management Consultant and President of Lund Financial Management. "Our personalized approach has earned us a reputation for excellence."

Built on service and long-term relationships, the company's mission is to help clients pursue financial stability and long-term independence through retirement planning, investment management, and estate strategies. They work with clients to create a clear, end-to-end roadmap aligned with their lifestyle and evolving needs.

"We're here to provide real service and support by helping clients navigate change and improve their situations," Jason explains. "If you help enough people get what they want, you'll get what you want."

A core focus of Lund Financial Management is addressing taxation, often the largest and least understood expense, as many people underestimate its impact on long-term financial health. Both taxation and inflation erode wealth over time.

"If you defer taxes without a strategy, you may pay significantly more later," he says. "Pay taxes on the seeds, not the harvest, and you can control the outcome."

With deep proficiency in tax strategy and exit planning, Lund Financial Management helps business owners and investors navigate complex transitions while preserving income and minimizing tax exposure.

What truly sets the firm apart is its commitment to education. Rather than simply consulting, the team empowers clients to understand their options, make informed decisions, and create benefits for their families and communities.

"At the end of the day, it's about improving lives. Financial planning isn't just about creating wealth; it's about creating sustainable income and long-term freedom."



Jason Lund

LUND
FINANCIAL MANAGEMENT

43460 Ridge Park Drive, Suite 200-K, Temecula, CA 92590
(951) 587-2957 | lundfinancialmanagement.com

Advisory Services Offered Through CreativeOne Securities, LLC an Investment Advisor. Lund Financial and CreativeOne Securities, LLC are not affiliated.