

Announcing the Launch of GOLDENSTONE WEALTH MANAGEMENT “Your Stepping Stone To A Golden Life”

Dr. Sanjay Varshney, CFA and Andres Villegas, CFA are leaving Wells Fargo Private Bank (Wealth and Investment Management) to launch their new co-founded firm: Goldenstone Wealth Management - an independent investment management and advisory firm based in El Dorado Hills providing custom tailored investment solutions to help grow and preserve the wealth of individuals, business owners, and institutions.

Varshney served as a senior wealth management executive and senior investment strategist for over \$200 billion in assets at the bank for over 5 years. He is also a Professor of Finance at Sacramento State and also the Chief Economist of the Sacramento Business Review.

Villegas was a Vice President and also an investment strategist managing more than \$400 million in client assets, having been at the bank for nearly a decade. Both Varshney and Villegas have the CFA (Chartered Financial Analyst) designation making Goldenstone the first and only firm in the greater Sacramento region to have both co-founders hold this prestigious gold standard in the investment industry.

Varshney was excited about the launch: “Our collective wealth management experience is extensive, spanning over 30 years, managing millions of dollars for clients in small investment boutiques as well those in one of the nation’s largest wealth management firms. After building and managing one of the most successful and respected investment management firms in New York, I feel it is time to do it again right here in Sacramento.”

Villegas, an accomplished investment portfolio manager has served the wealth and investment management needs of families, businesses, and nonprofit organizations in Texas, New Mexico, California, and Latin America and was looking to build his own dream firm. “We have helped clients succeed in bull and bear markets, thrive through economic booms and busts, and navigate the most difficult and uncertain financial times with discipline, skill, and confidence. Sacramento has a growing diverse community, and being Hispanic myself, I am looking forward to building a great future here.”

CONTACT INFORMATION

Goldenstone Wealth Management

5170 Golden Foothills Parkway

El Dorado Hills, CA 95762

contact@goldenstonewealth.com

916-799-6527

www.GoldenstoneWealth.com