SEIA

Signature Estate & Investment Advisors, LLC®

Established 1997

CONSISTENCY MATTERS

Brian D. Holmes was named in 2019 to Barron's Hall of Fame after being listed as a top independent financial advisor for **eleven** consecutive years from **2007-2018**.

BRIAN D. HOLMES
MS, CFP®, AIF®
President and CEO

CHAD BATES
CFP®, AIF®
Advisor

CALVIN TSENG
CFP®
Associate Advisor

Brian is one of SEIA's four founding partners who have shared over two decades of teamwork together. SEIA and its affiliates currently manage **$13.6 billion** in assets as of 12/31/2020. Brian was named to the Barron's Hall of Fame in 2019, as one of 145 advisors nationwide. Each member of the Hall of Fame has appeared in ten or more Barron's Top 100 Advisor Rankings. He is the only advisor from SEIA's Los Angeles and Orange County offices to make the elite Barron's Top 100 Independent Advisors from 2007-2018. Additionally, SEIA has received acknowledgment from:

FINANCIAL TIMES

Top 300 Registered Investment Advisers List 2020
Top 400 Financial Advisers 2020 - Brian Holmes

BARRON'S

Top 100 RIA Firms 2020

INVESTMENT NEWS

Best Places to Work for Financial Advisers 2021

LA BUSINESS JOURNAL

Largest Money Management Firms 2020 (ranked by assets managed)
Leaders of Influence: Wealth Managers 2020 - Brian Holmes

AT A GLANCE

37 YEARS EXPERIENCE Brian has been in the investment management business for over 35 years, maintaining a successful independent private practice with his team for over 300 clients.

BOARD MEMBER He is a past member of the Schwab Institutional Advisory Board and served on the UCLA Department of Economics Board of Visitors to enhance the curriculum of the Business and Economics major.

DESIGNATIONS He has been a CERTIFIED FINANCIAL PLANNER™ (CFP®) since 1988 and also earned the Accredited Investment Fiduciary® (AIF®) professional designation from Fiduciary360 in 2011.

DEGREES He received his Bachelor of Arts degree in Psychology with an emphasis in Business Administration from the University of California, Los Angeles (UCLA) in 1983. Additionally, in 1994, he received a Master of Science degree in Financial Services from the College of Financial Planning.

FAMILY He is a 35 year resident of Malibu, California along with his wife, son and daughter.

PHILANTHROPY He is philanthropically involved with numerous charities in the Southern California area.

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