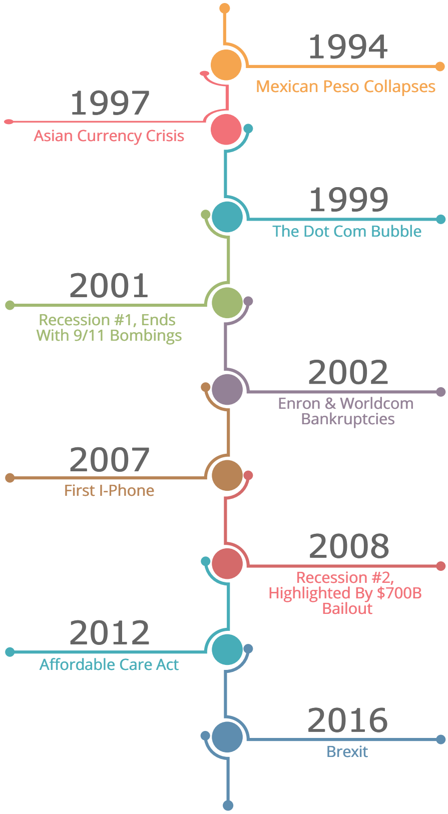
About William Allan

We are the type of investment advisory firm that we would want offered to us – an experienced, client focused firm with a true passion for improving people's financial lives and behavior through proper investment management . There are many terms we could use to define our firm... below are a few key aspects of William Allan we'd like to highlight for you.

Experience: Two Decades Worth

We've seen a lot over the years and know we are going to see a lot more in the future...thankfully we have been tested and are prepared.



100% Aligned With Our Clients

Financial advisors have numerous business models to choose from to run their business. Below are the key aspects of ours that keeps us aligned with our clients.

Fee-Only

"Fee-only" means as advisors we only collect revenue from fees charged to our clients. We do not receive "revenue sharing" from 3rd party mutual funds or any other entity. Simply, our compensation is 100% aligned with your portfolio's value.

Independent

As independent investment advisors, we can easily focus on our ONE and only goal: Grow our clients' capital ultimately achieving financial flexibility in the future. We are not a part of a giant organization that may put their company's goals ahead of those of the client.

Investment Managers

We do not farm out the management of your investment portfolio. We do all of the research, analysis, reviews in house, giving us an intimate knowledge of the companies we focus on. Over the long-term this has proven successful and most notably in volatile times.

In Summary, The Advisor We Have Become

Our client / advisor relationship dictates we always do what is in the best interest of YOU, the client. Furthermore, as experienced advisors that came into this industry as investors first, you can rest assured your investments are the same as our investments. To quote the greatest investor of our time:

"We eat our own cooking."

Headquarters:
21650 Oxnard St., Suite 130
Woodland Hills, CA 91367

South Bay Office:
4000 Long Beach Blvd., Suite 202
Long Beach, CA 90807

Phone: 800-677-5309 Fax: 818-474-7050
www.willallan.com

William Allan
- FINANCIAL SERVICES -

A Quarter Of A Century Of Investment Experience

The principal advisors of William Allan, Jason & Marcus Crawshaw, have 50+ years of business experience holding various positions in corporate America. About 25 years ago, we felt the pull to the investment world and rather than join the sales program of a stock brokerage firm, our continuing education began via an investment club. We are in this business because we love investing and now we are humbled that others allow us to help them achieve their financial goals through our time tested investment approach.

Our Investment History... A Unique, But Meaningful Path

1992 - 2017

October 1992

While in college, we decide to become investors and start The Westmoreland Group (TWG), an investment club with 10 members making monthly contributions as well as collective investment decisions.

April 1994

A year and a half later, we become managing members of TWG, responsible for all investing decisions and the operations. Done on a pro-bono basis, we applied knowledge gained from reading about Ben Graham, Warren Buffett & Peter Lynch.

August 1996

Two years after taking over as managing members and applying the teachings of some of the great investors of our time, we added the Economic Value Added principle to our company analysis. A game changer for us and our performance.

February 2001

After numerous requests from TWG members to manage their personal accounts, we decide to become professional investment advisors (passing the Series 65) and thus launching Crawshaw Capital Management, LLC (CCM).

December 2002

After 10+ highly successful years, we closed TWG as most members were now clients of CCM. TWG members saw an average annual return that bested the S&P 500 annually by 6%. A great decade of performance, but more importantly, the bedrock of the investment approach we use today.

January 2004

With decades of tax preparation experience, we see the naturally connection of investment advice and tax planning & preparation. Therefore, CCM morphs into William Allan Financial Services (WA).

Today

With 15+ years as investment advisors we continue to operate as an independent, fee-only firm building long lasting successful client relationships.

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