The Rice Partnership
Wealth. Management.
1304 Santa Rosa St. | San Luis Obispo, CA 93401







THE LATEST FROM OUR COMMUNITY TO YOURS

Portfolio Manager Ryan Luna joins SLO office



The Rice Partnership is pleased to announce that Ryan Luna has joined our wealth management team as Portfolio Manager. He will be based at the firm's downtown San Luis Obispo office.

Luna has worked in the investment industry for over 16 years. For the past four years, he was a Portfolio Manager at Signature Estate & Investment Advisors in Newport Beach where he managed multi-asset portfolios for a $10.5 billion investment advisor, as well as coordinated trading, operations, marketing and compliance groups.

"Ryan has proven he knows how to balance performance and risk across a broad range of portfolios," says Senior Wealth Manager and Portfolio Manager Ashley Wilken. "He brings a high level of expertise to the table and we're excited to make his valuable experience available to our clients."

Luna graduated from the University of Southern California with an MBA in Finance. Previously, he earned two BA degrees from the University of California, Riverside and holds the Certified Investment Management Analyst® certification, administered by Investments & Wealth Institute™ and taught in conjunction with Yale School of Management.

Open House celebration kicks off summer



Coming June 23, The Rice Partnership will celebrate its second amazing year of business in SLO with the perfect blend of music, food and friends.

Bites and libations will be provided by Jimmy's Watering Hole while Dan Curcio will keep the energy flowing throughout with live music. If you're in the neighborhood between 5 and 8 pm, be sure to stop by!

For more information, call 805.517.4122, **www.thericepartnership.com**.

The Rice Partnership is a boutique wealth management firm headquartered in Honolulu with offices in Maui and San Luis Obispo, CA. The firm offers wholistic wealth management services including asset management, family office, and financial advisory.