

# ELITE WEALTH & TAX PLANNING

Maximizing your Success

**Rick  
Martinez**

**Diane  
Castro**



**Rene Castro**  
Owner & Founder of Elite  
Wealth & Tax Planning

**Steven  
Martinez**

## ARE YOU PAYING TOO MUCH IN TAXES?

Our Firm's Mission is to help our already successful clients legally mitigate their taxes while Maximizing their wealth, so they can enjoy what's more important than money; Faith, Family & Friends and helping their favorite causes while enjoying a living and loving legacy of success.

We accomplish this through our "VIRTUAL FAMILY OFFICE" approach collaboratively working with the best of the best: CPAs, Enrolled Tax Agents, Certified Financial Planners™, Estate & Tax Attorneys, and other professionals.

CLARITY-FOCUS-BALANCE & CONFIDENCE: our six-step Elite Wealth & Tax Planning Process™ is designed to help our clients experience: Clarity, Focus, Balance & Confidence in their wealth and lifestyle decisions and choices.

SUPER RICH STRATEGIES: Rene Castro, founder of Elite Wealth & Tax Planning, is an extremely passionate teacher and dedicated student of Elite Wealth & Tax Planning Strategies that have been used by the SUPER RICH (Those with \$500 million or more net worth) for decades, bringing these tools and strategies to his successful clients who want to maximize their wealth.

Rene and his team love to help their clients implement powerful wealth & tax plans so they can enjoy their ideal lifestyle many times better than they ever thought possible.

Our team of professionals includes my wife, Diane, and son, Steven, and Rick Martinez. It's a case of our family helping yours.

Because of the Elite Wealth & Tax Planning teams dedication in empowering our clients to achieve their goals and dreams, our clients are more than happy to refer those they care most about.

Away from work, Rene is active in the community through his church and various civic improvement groups. The foremost goal of Rene and Diane is to leave a Living & Loving legacy by helping their kids and grandkids to grow in their faith and have a strong work and community service ethic. Rene and Diane cherish nice BBQs in their backyard with family and friends and time spent at the beach.

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