



Matthew Belardes

Wealth Management Specialist



In 2008, Matthew was in law school at USD and working at Citi Smith Barney (now Morgan Stanley), eventually moving to Credit Suisse. When Credit Suisse closed their American private banking division in 2016, Matthew explored all 50 states with his wife. He spent a few months at Wells Fargo but did not feel it was the right fit. Matthew was ready to jump to a legal career in estate planning when he reconnected with Erica Tanner who introduced him to Art.

Mathew is responsible for investment trading and performance reporting as well as supporting our portfolio research and analysis efforts. He is also an attorney and acts as a compliance liaison.

If time and money were unlimited... Matthew would do a lot of what he currently does in different places around the world, like read by a fire in a cabin with a view of the Alps or in a hammock on a beach in Southeast Asia. Work is still important to him, so he would remain in the investment business as well as teach at a university.

Matthew's role model is... Tom Brady, quarterback and six-time Super Bowl winner with the New England Patriots. He is a mediocre athlete but his work ethic, heart, competitive drive, and team player mindset have made him the best player of all time. On top of that, he's a family man.

Matthew is an avid reader of books, especially political theory and history. This helps him understand and interpret changing patterns in markets and our society as well as how they may or may not impact the lives of our clients. When not at the office he usually hangs out at home or the beach with his wife, Aysen. Matthew have traveled to all 50 states and around the world once.

Professional Licenses and Certifications:

FINRA series 7 and 63
Chartered Financial Analyst (CFA®)
Certified Financial Planner (CFP®)
Attorney – State Bar of California
California State Insurance Licensed

Professional Affiliations:

Member California Bar Association #326455