Index Fund Advisors
WEALTH MANAGEMENT • TAXES

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Denise Delaney is a Senior Vice President and Wealth Advisor (Series 65) at Index Fund Advisors, Inc. She has more than 29 years of experience in the industry as an advisor and is a Certified Financial Planner (CFP®).

Denise specializes in advising a range of clients including younger families looking for retirement planning to high net worth individuals with specific requirements and complex financial, estate and long-term care planning needs. She also has many years of experience in advising investment committees for endowments, foundations and pension plans, as well as working with companies to construct highly diversified, low-cost 401(k) retirement solutions for their employees.

Denise understands that not all clients share the same knowledge regarding the investing process. She skillfully identifies clients' needs and educates them about the benefits associated with a passive investment strategy—creating peace of mind as well as a comprehensible financial solution to assist clients in reaching their financial goals.

Denise earned her undergraduate degree in Business Administration from the University of Phoenix. She has been a Southern California resident since 1991 and enjoys hiking and a healthy lifestyle with friends and family. Denise was designated a CFP in August of 1992 and looks forward to many years of continued service to her valued clients.

Certified Financial Planner ™ (CFP®) is a designation received upon passing the course work and exam administered by the Certified Financial Planner Board of Standards, Inc. (CFP Board).

About IFA

Founded in 1999, Index Fund Advisors, Inc. is a fee-only advisory and wealth management firm that provides risk-appropriate, returns-optimized, globally-diversified and tax-managed investment strategies with a fiduciary standard of care. The value of IFA extends beyond investment advice. As a holistic financial partner, IFA helps guide investors through all life and retirement stages. Our Wealth Advisors take a personalized approach to matching people with portfolios while providing a full-range of wealth services.