



Candise C. Holmlund, CFA, CFP®, TEP, AEP®
President & Founder, Alaethes Wealth LLC

President and Founder of Alaethes Wealth LLC, Candise established the firm in 2019 to offer a boutique wealth management experience to clients through a very personal, comprehensive, and collaborative relationship. With more than 40 years of experience in financial markets, Candise has an extensive career in investment strategy, financial planning, estate and tax planning, and multi-generational wealth management.

Throughout her career, Candise has built a reputation for developing long-term, trusted relationships with clients, many of whom are entrepreneurs, executives, and multi-generational families with complex financial needs. Her approach is rooted in communication, collaboration, education, and transparency, helping clients align their financial decisions with their values and long-term goals.

Before founding Alaethes Wealth, Candise spent over two decades as a senior partner at Weatherly Asset Management, LP in Del Mar, California. There, she managed many of the firm's largest and most complex client relationships and was responsible for the firm's options strategy. Her earlier career includes serving as Vice President and Manager of Trading and Investments at First Interstate Investment Services in Los Angeles, where she was responsible for managing a \$5 billion institutional fixed income portfolio for major public pension systems, including CalPERS and CalSTRS. She also served on the bank's investment committee.

Candise began her career at Merrill Lynch Capital Markets specializing in restricted stock sales and executive equity strategies, working with Silicon Valley founders and key executives on pre- and post-liquidity planning. After leaving Silicon Valley, Candise continued with Merrill Lynch Capital Markets trading fixed income and derivative securities in the Institutional Sales and Trading Division.

She holds multiple industry charters or credentials, including the Chartered Financial Analyst (CFA®), the Certified Financial Planner (CFP®), Accredited Estate Planner (AEP®), and Trust and Estate Practitioner (TEP).

Candise has passed the Series 3, 7, and 63 industry exams as well as life insurance and annuity exams. She serves as a speaker or panelist on wealth planning forums and is recognized as a Subject Matter Expert for the Certified Financial Planner Board of Standards.

She is an active member of several professional organizations, including the CFA Institute, CFA Society of Nevada and San Diego, Society of Trust and Estate Practitioners (STEP), Estate Planning Council of San Diego, North County Estate Planning Council, Estate Planning Council of Nevada, and the National Association of Estate Planners & Councils, among others.

She has received the Five-Star Wealth Manager Award as featured in *San Diego Magazine* each year from 2006 through 2025, was nominated multiple times as *San Diego Magazine's* "Woman of the Year," and has been listed in the *San Diego Business Journal's* SD 500 list of top business leaders. Alaethes Wealth was also named a Best Practice Winner by *Investment News* in 2022 in the Solo Practices category (all disclosures available upon request).

A dedicated advocate for philanthropy and community engagement, Candise serves as current Investment Chair and past President of the RSF Foundation Women's Fund, past Chair of the Scripps Health Gift Planning Advisory Board, and has been a board member of the Fidelity Wealth Advisor Solutions Advisory Board, the Scripps Health Foundation Board, the International Bipolar Foundation, and A Step Beyond.