LEGACY BY DESIGN

In a community like La Jolla, success is rarely accidental. It is built through years of discipline, vision, hard work, and thoughtful decision-making. For many successful families, entrepreneurs, executives, and retirees, the question eventually evolves from "How do I make more?" to "How do I protect, preserve, and intentionally pass on what I've built?"

That is where Joe Lucia has dedicated his life's work.

Born and raised in San Diego, Joe understands the ambition and complexity of Southern California's high-net-worth families because he has lived it. As a partner with Lucia Capital Group, he has spent years helping affluent individuals, families, and business owners navigate critical financial decisions with clarity and confidence.

Legacy by Design is more than a tagline — it is Joe's guiding philosophy. He doesn't just manage wealth; he architects it with intention. With radical transparency, relentless advocacy, and deeply integrated planning, he helps clients transform complex financial lives into clear, confident legacies that endure for generations.

What sets Joe apart is his ability to see the person behind the portfolio. His conversations go well beyond investments to encompass retirement income, tax-efficient planning, business transitions, estate structuring, charitable goals, and multigenerational wealth transfer.

In La Jolla's multidimensional wealth environment, Joe simplifies complexity through coordinated, holistic planning. No hidden layers. No one-size-fits-all solutions. Just strategic clarity that puts you in control for decades to come.

For Joe, true wealth isn't about accumulation. It's about the freedom and confidence it creates.

Legacy by Design.
Yours, by intention.

LUCIA
CAPITAL GROUP



At Lucia Capital Group, we don't just manage wealth — we architect it with intention.

With radical transparency, relentless advocacy, and deeply integrated planning, we help high-net-worth families turn complex financial lives into clear, confident legacies that endure for generations.

No hidden layers. No one-size-fits-all advice. Just strategic clarity that puts you in control — today and for decades to come.

Ready to design a legacy that reflects your values?

Schedule a Discovery Call >
Call, click, or scan the QR code

(800) 644-1150

https://legacy.luciacap.com

There is no guarantee that any investment strategy will meet its stated objective. All investments involve risk, including potential loss of principal. We encourage you to seek personalized advice from qualified professionals regarding all personal finance issues.

There is no guarantee that any investing strategy will be profitable or provide protection from loss. Securities and advisory services offered through LPL Financial, a registered investment advisor and member FINRA/SIPC.