

## INVESTMENT MANAGEMENT

Helping you create a comprehensive financial plan and investment strategy – then helping you monitor your progress.

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## FINANCIAL PLANNING

I'm at your side to help answer your questions and provide guidance and advice to help you map out your financial plan.

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## PERSONAL ATTENTION

Life events and changes require adjustments to your plan. I'm here to help you adjust your financial plan to fit your changing needs.

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## CFP®



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