



## We actively manage retirement money

professional, independent and working solely in your best interest



### Portfolio Management *Independent & Impartial*

Working to grow and protect our clients' wealth for more than 25 years in Saratoga Springs, Cooperstown and St. Augustine, FL

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### 401k & 403b Plans *Fiduciary Advisors*

Helping employers & non-profit boards improve and monitor their 401k / 403b plans using a sound fiduciary process.

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### Educational Events *Seminars & Workshops*

We regularly hold educational events for our clients and prospective clients on a variety of topics such as Retirement and our Social Security.

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