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PORTFOLIO MANAGEMENT

For Individuals

401K PLANS
For Employers

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ABOUT

Get to know us



We actively manage retirement money

professional, independent and working solely in your best interest



Portfolio Management Independant & Impartial

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

CONTINUE READING



401k & 403b Plans *Fiduciary Advisors*

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

CONTINUE READING



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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FACEBOOK

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