



MANAGING WEALTH AT THE HIGHEST LEVEL

[CONTACT US](#)

DO YOU NEED MORE TIME TO ENJOY LIFE?

We are a fee only financial advisory firm helping clients refocus their time and energy to what matters most to them. If you are looking for an innovative planning process and tax focused investment strategy, let's talk.

[I'M READY](#)



INDEPENDENT

We are not tied to any family of funds or investment products. As fiduciaries we act in your best interest, at all times. We use an independent custodian (Charles Schwab & Company, Inc.) so we have a system of checks and balances.



FEE-ONLY

We offer transparent advice and do not take commissions or third party hidden fees. We sit on the same side of the table as you when making recommendations.



TAX EXPERTISE

We are CPAs and Enrolled Agents, with tax preparation experience – tax efficient investment management.

TEAM



CLIENT LOGIN

MODEST SPARK PORTAL LOGIN

BLOGS

SHOULD YOU BE
WORRIED
ABOUT
RECEIVING YOUR
SOCIAL
SECURITY
BENEFITS?

MONEY LEFT IN A
529 PLAN? GOOD
(OPTIONS) FOR
YOU!

LIVE LIKE YOU'RE
RETIRED

NORTH METRO

763.355.5873
227 East River
Parkway
Champlin, MN
55316-5873

SOUTH METRO

612.987.9112
5871 Crossandra
Street SE
Prior Lake, MN
55372-3337

WEST METRO

763.639.3425
322 Greenhill Lane
Long Lake, MN
55356

WEST END

303.819.1664
1650 West End
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