

We work for you,
not Wall Street.

Independent
Fee-Only
Financial Adviser



"It's time for a new approach. "

- Frank Byrd, Founder

PLANNING

Holistic planning from a fee-only adviser (not commission salesperson)

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INVESTING

Portfolio management customized to your situation and your values

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FIDUCIARY

Held to a fiduciary standard (at all times)

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Investing Alongside Founders

June 16, 2019



The Illusion of Safety

May 18, 2019



Not Your Grandfather's World

April 12, 2019



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