

ABOUT US

Named after Ellis Island, the firm is comprised of professionals with significant years of experience within the financial services industry where many of the team members have been together for 10 to 20+ years. Our clients are located nationwide and include individuals, high-net worth individuals, trusts, estates and charitable...

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Mission Statement

In a world dominated by **Fear** and **Greed**, three topics constantly come up in discussions within our firm. They are **Integrity**, **Family** and **Quality of Life**. These words resonate within us as we set out to help you reach your financial needs and objectives.

We believe that **Integrity** is an intrinsic part of one's being and cannot be taught. It is a quality we seek when adding new members to our firm and we continually hold all existing members of our team to the highest level of integrity in dealing with clients and colleagues.

We believe that **Family** is true wealth that cannot be measured. As such, spending time with family is priceless and protecting the future of your family through sound investments and financial planning is a must.

We believe in the **Quality of Life** where everyone deserves to be happy. Our involvement in your unique situation to ensure that your financial house is in good order provides the opportunity for you to enjoy aspects of your life including retirement.

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Our Services

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David Y. Sun, CFA®
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