LUKEN™

What's your ideal life look like?

We'll help you get there.

Get Started

We move investors forward to achieve the goals they are passionate about.

We do this by redefining the way people invest.

Our clients come to us from various stages of life.

No matter what stage is unique to you, we’re here to help.

Our process is simple. It’s adjusted based on *your* goals, on *your* needs, and on *your* watch.

Roadmap Meeting – In our first meeting, we learn about you. The journey you’re on, your goals, your needs, your aspirations and your expectations.

Implementation Meeting – In our second meeting, you’ll learn about the plan we’ve tailored to you. If it’s the right fit, we’ll begin our journey together.

45-Day Follow-Up – In our third meeting, we’ll go over the questions you may have about your accounts, your online portal, or any other items. We will then set up your ongoing meeting schedule.

We’re here for you.

We will sit down and meet with you based on your needs, whether that's once a year or three times a year.

Throughout the year, you'll receive updates from us. We are proactive in making sure your questions get answered.

Every month, you will receive video market updates via email so that you always stay informed with what's going on with your portfolio.

So what makes us different?

- ## Our investment approach.

  We use Smart Diversification®.

- **360 degree review of your financial life.**
  We leave no stone unturned.
- **We serve a limited community of investors.**
  Our attention is focused on you.

Tell Me More

Ready to get your feet wet?

Contact Us

Want to learn more about our team?

Yes Please!

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Disclosures