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FINANCIAL PLANNING & INVESTMENT MANAGEMENT

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HIGH NET WORTH FAMILIES

Professional wealth management services to help protect and grow the wealth of your family.

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BUSINESS OWNERS

Helping Business Owners Coordinate, Consolidate, and Simplify Their Financial Life.

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PRE-RETIREES

Implementing income strategies that allow our clients to enjoy their retirement.

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Voted "Best In Destin" Financial Planner | 2014, 2015, and 2016*

Voted "Best of The Emerald Coast" Financial Planning/Investment Firm*



We offer customized, unbiased solutions to guide our clients toward their financial goals.

[meet your advisor \(/about/meet-the-team.html\)](/about/meet-the-team.html)



A Message from the Founder

Our mission is to provide unbiased wealth management services to help protect and grow your wealth.

Dustin W Terry

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MAY ▶

Are dividends a reliable source of income?

Dividends can be an important source of income. However, there are several factors you should take into consideration if you'll be relying on them to help pay the bills.

[read more \(/our-blog/40-are-dividends-a-reliable-source-of-income.html\)](/our-blog/40-are-dividends-a-reliable-source-of-income.html)

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OCT ▶

Common Factors Affecting Retirement Income

When it comes to planning for your retirement income, it's easy to overlook some of the common factors that can affect how much you'll have available to spend.

[read more \(/our-blog/39-common-factors-affecting-retirement-income.html\)](/our-blog/39-common-factors-affecting-retirement-income.html)



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