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How I Work

An independent, knowledgeable and trusted financial professional since 1998, Andy helps people pursue their goals in life. He does this by guiding his clients through a unique process of financial discovery and planning, implementing creative and suitable strategies and conducting periodic reviews with the goal of making highly informed and suitable financial decisions over extended periods of time.

Andy's clients are a select group of closely held business owners and professionals, corporate executives and affluent retirees. Whether your situation requires advanced insurance and estate knowledge, state of the art financial planning software and investment products, guidance in designing and implementing 401k and profit-sharing plans, or just some good advice, Andy is able to help you.

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