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## Blog

[High Net Worth Families Need a Complete Risk Management Plan (/node/1040)](/node/1040)

by **Scott Pulsifer** on **Sep 29, 2017**

Because there isn’t a one-size-fits-all plan that could possibly fit the unique needs of every family, risk management is a process that focuses on the problem of risk at every level of a family’s lifestyle in order to ultimately arrive at a solution for each. Each risk calls for separate measures, which usually require separate forms of insurance.

Read More (/node/1040)

## The Keys to Building Wealth (/node/1039)

by **Scott Pulsifer** on **Sep 29, 2017**

For many Americans, building true wealth might seem elusive, even illusory considering that many people, who very recently were sitting on six and seven figure 401k plans and home equity values, now feel unprepared for retirement. The lessons learned from the financial crisis is that wealth can be fleeting.

Read More (/node/1039)

## Game of Life: Financial Planning At Every Age (/node/1038)

by **Scott Pulsifer** on **Sep 29, 2017**

If you’ve ever played the Game of Life board game, it becomes clear that compressed into the colorful path there are various stages of life. Each stage holds its own major financial challenges as well as prospective profits in addition to surprises (new baby!) and forks in the road.

Read More (/node/1038)

# Service Team

(/team-member-01/scott-pulsifer-cfa-cfpr)

(https://www.linkedin.com/in/pulsifer/)

## Scott Pulsifer, CFA, CFP® (/team-member-01/scott-pulsifer-cfa-cfpr)

Financial Life Planner / Managing Partner

(/team-member-01/stephanie-disabello)

## Stephanie DiSabello (/team-member-01/stephanie-disabello)

Head of Client Service

**Role:** Stephanie's personal mission is to ensure that everyone realizes value and knows how important they are to us.

(/team-member-01/kevin-r-harper-mba)

## Kevin R. Harper, MBA (/team-member-01/kevin-r-harper-mba)

Portfolio Manager

**Role**: Kevin is responsible for the development and implementation of investment solutions and research.

**Specialization**: Portfolio Management

[(/team-member-01/james-w-judge-cfa-mba)](/team-member-01/james-w-judge-cfa-mba)

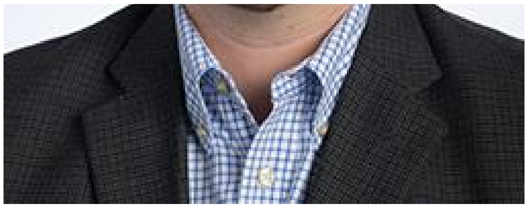
## [James W. Judge, CFA, MBA (/team-member-01/james-w-judge-cfa-mba)](/team-member-01/james-w-judge-cfa-mba)

CFA, MBA

Chief Compliance Officer

**Role:** Jim is responsible for portfolio operational functions, including compliance and trading.

**Specialization:** Portfolio Management



[(/team-member-01/daniel-c-guy-cfa-caia)](/team-member-01/daniel-c-guy-cfa-caia)

## Daniel C. Guy, CFA, CAIA (/team-member-01/daniel-c-guy-cfa-caia)

Senior Analyst

**Role**: Dan is the trader of investment strategies and serves as the liaison to the Junto Wealth client service team.

**Specialization**: Investment Trader and Performance Manager

## Michael J. Gompers, MBA (/team-member-01/michael-j-gompers-mba)

Financial Investment Advisor

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