

An independent, boutique investment counseling firm

Goal-oriented, personalized investment advice implemented with low cost, diversified investments.

Clients come first. As an independent, boutique investment counseling firm, we provide individualized solutions to meet your unique circumstances and goals.

As our name suggests, we invest for portfolio longevity. We hold ourselves out as professionals and fiduciaries meaning that it is our legal and ethical duty to put your interests ahead of our own. We specialize in managing money for individuals which requires the customization of portfolios in consideration of taxes. We encourage prospective clients to understand our philosophy, process and portfolios to ensure there is a good fit between us.



"I always hoped retirement would look like this."

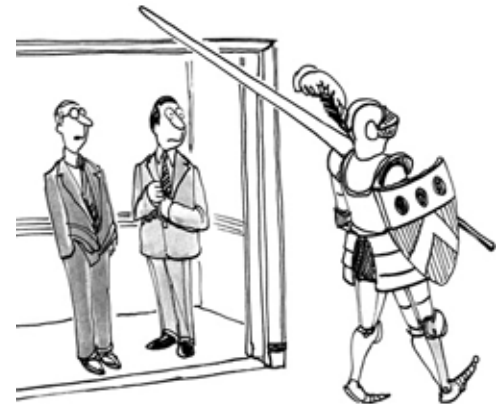
Our compensation comes from fees from our clients. We do not receive commissions nor do we receive compensation based on which investments we select for our clients.

with you.



"Great plan. Could we get some more details?"

PROCESS



"He really takes IT Security seriously."

CONTACT

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