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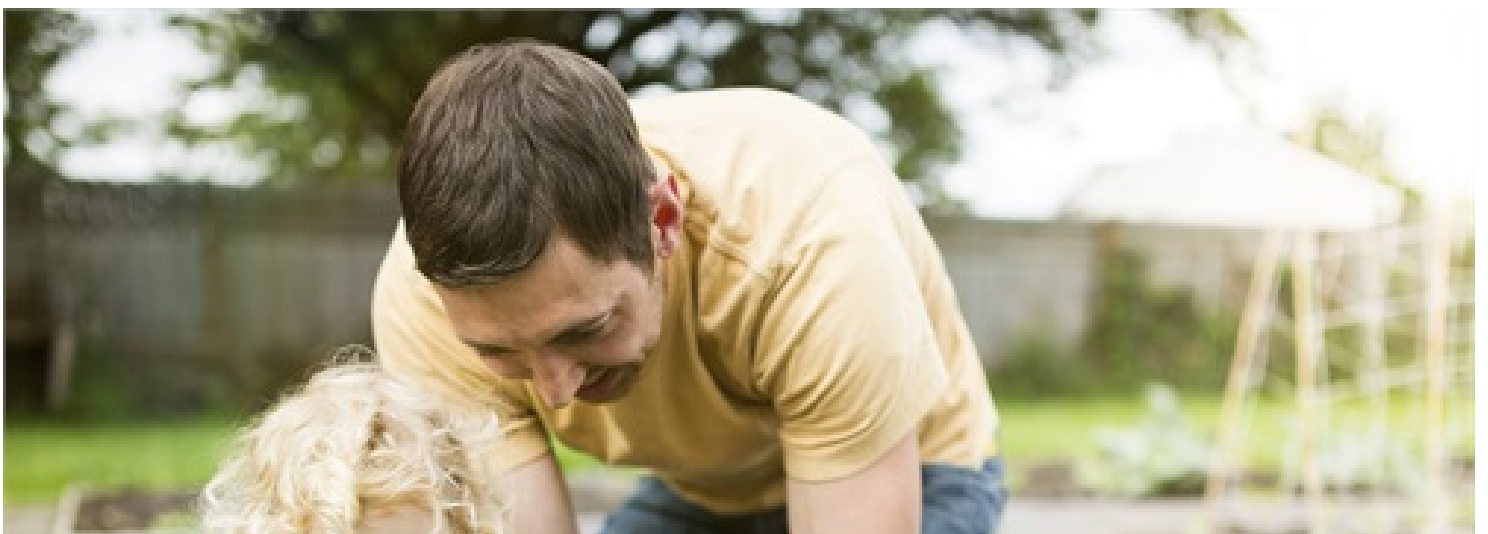
Most people assume financial planning is simply about the money. Of course this is a critical component, yet there is more to it than that. It's really about you, your values, your family, and your relationships. From our very first meeting, we encourage you to articulate what is most important to you. As we work through this process, a clarity and direction emerge that will set a course toward addressing the financial goals desired for you and your loved ones, in pursuit of the life you envision.



Who We Are

Your team of financial advisors, dedicated to always placing your interests first.

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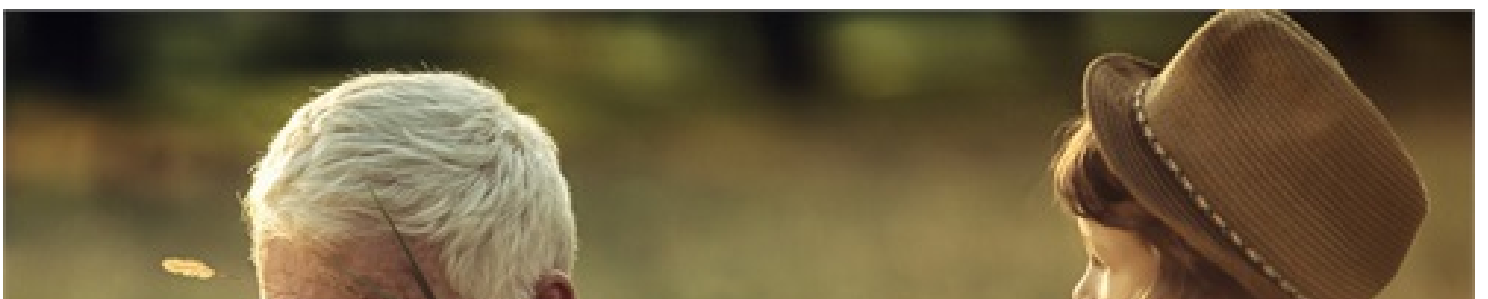




What We Do

We free up your time to take care of the important things in life.

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Why We Do It

We enjoy building trusted relationships that span generations.

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Putting Our Clients' Interests First

We believe in placing our clients' best interests first, therefore, we are proud to commit to the following five fiduciary principles:

- We will always put our clients' best interests first.
- We will act with prudence, that is, with skill, care, diligence, and good judgment of a professional.
- We will not mislead clients, and we will provide conspicuous, full, and fair disclosure of all important facts.
- We will always be objective in our advice.

- We have an affirmative duty of care, loyalty, honesty and good faith to act in the best interests of our clients.



Meet Our New Team Members!

J. D. White CRPC®, AAMS®

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Meet Our New Team Members!

Pam Rosenblum

[LEARN MORE](#)



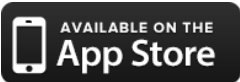
Meet Our New Team Members!

David Richey CFP®, ChFC, CRPC™

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