



# What makes us different

Our unique wealth management formula, for one.



INVESTMENT  
CONSULTING



ADVANCED  
PLANNING



RELATIONSHIP  
MANAGEMENT

Find out how this simple formula becomes remarkably powerful  
when we work together.

Our Formula (<http://mononwealth.com/how-we-work/our-formula/>)

## Extraordinary attention to personal service

We created a firm that combined proven processes and our knowledge of economics with extraordinary attention to personal service. We set out to be the ideal choice for a select group of individuals who would appreciate a structured approach built upon their unique goals. That way, we could get know our clients well and have a meaningful impact upon their lives.

## We prosper only when you do

As a fee-only firm, we've created an approach that rewards us for just one thing: helping your investment portfolio grow in every market environment. Are we the right choice for your family's financial needs? We invite you to learn more about our approach and attitudes, and then schedule a **Discovery Meeting** (<http://mononwealth.com/how-we-work/our-process/>) where we can learn more about each other.

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