



Private

We are designed to meet all the financial needs of a very specific clientele. We accept new clients on a referral basis only.

Wealth

Our recommendations take into account a client's entire financial situation.

Solutions

We provide BOTH the pros and the cons of any financial solution we recommend.

About Us

Services

Our Team

Considering Us?

Investor Education

Organizing Your Finances

Registered with and securities are offered through Kovack Securities, Inc. Member [FINRA/SIPC](#).

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