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My Plan (<https://wealthemaplan.com/ema/ria/briofg>)

(/) My Portfolio (<https://login.orionadvisor.com/login.html?briofg&g=054b0c4d-bc82-4b37-b7f9-b5b0ef9b54b4>)

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HOW BRIO IS DIFFERENT BY DESIGN®.

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ABOUT BRIO

(/ABOUT-US)

We're proudly unconventional. Take a team approach. Offer comprehensive guidance.
Charge simply.

SEE WHAT MAKES US DIFFERENT ([HTTPS://WWW.BRIOFG.COM/ABOUT-US](https://www.briofg.com/about-us))

GET THE MOST LIFE OUT OF YOUR MONEY

Sure, accumulating wealth is great. But only if it helps you live your best life. That's where Brio comes in. We can help you plan for and enjoy the things that truly make you feel happy and secure.

How you ask? By first learning who you are. Yes, your account balances and risk tolerance are important. But they can come later. What we first want to understand is what drives you. What your passions are. What keeps you up at night. Who and what you want to protect.

Because knowing you as an individual allows us provide you with a truly individualized financial plan.

And as you transform that plan into action, we'll be there to coach you along. Provide

the encouragement to keep you motivated and on track. We'll celebrate your accomplishments. And be there for you during personal challenges. Always providing



guidance for how to make sound financial choices during life's major transitions.
and we'll make it all a lot more fun than you might think.
Ready to start getting the most life out of your money? We're just a click or call away.



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OUR PROMISE TO YOU

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EXPERTISE

Advice based on deep financial knowledge, technical expertise and ongoing education.



OPEN-MINDEDNESS

Judgment-free guidance whether you're conventional or un-, LGBTQ—or any other initial you consider yourself.



HONESTY

A core commitment to always acting in your best interests.



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SIMPLICITY



ard fees, plus state-of-the-art tools and services that help you understand your portfolio. And your life.



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FUN

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An attitude that makes wealth management enjoyable, not scary or boring.

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START INVESTING ON YOUR OWN TERMS.

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ABOUT US



As LGBTQ specialists, we excel at complex and unconventional financial situations—though you don't have to be gay or complicated to be accepted here! For nearly 20 years, we've been having fun making friends with our fiercely loyal clients while helping them win at life. We look forward to welcoming you to the family.



My Plan (<https://wealthemaplan.com/ema/ria/briofg>)
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