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## As a fiduciary, we provide independent, unbiased advice.

We have chosen to structure our firm as a Registered Investment Advisor (RIA).

RIAs meet a rigorous standard of client care known as the fiduciary standard. Like lawyers or doctors, we must work in clients' best interests, and clearly disclose any potential conflicts of interest. Advisors at Wall Street firms are almost always brokers, who earn commissions for selling investments. Not only is the brokerage/commission model inherently conflicted, but brokers are bound by a far weaker standard of client care than true advisors.

Every financial advisor claims to be on their clients' side, but only those that back it up with a truly client-centric business model deserve your trust. At Breachway Investments, our structure frees us to pursue our great passion: doing everything we can to help you succeed.

Our Company

## Wealth Management built for you.

Breachway Investments is committed to helping our clients reach their most important goals. We provide comprehensive planning and guidance, and we also coordinate with your outside experts, including accountants and attorneys, to ensure that your plan is implemented cohesively and completely. Our services fall into two main categories: <u>Financial Planning</u> and <u>Investment</u> <u>Management</u>.

Our Services

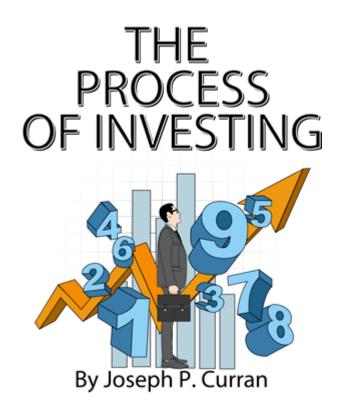
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Years of investment experience

## The Book

The purpose of this book is to share my formula for building financial plans and managing investments. I draw from personal as well as academic and professional experiences to form a comprehensive approach.

Buy Now



## Get a complimentary financial review

We offer a complimentary "Get Acquainted" meeting to describe our services, and to see if our services are right for you.

Let's begin <u>(860) 709-0909</u>