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An Entrepreneur Series - Sustainable W...



LET'S GET ACQUAINTED... Incorporating values driven investing in his approach created a perfect opportunity to fully realize this vision and put people and planet on the same plane as profit. Harry states: "Understanding our clients' deepest personal values and convictions is the starting point and foundation for all the firm's relationships".

Financial planning is also a key element of this vision. Once Harry understands a client's core values and goals, he works on building a solid financial plan to provide the framework and

context for all decision-making. While some advisors are all too willing to dispense with this labor-intensive process, Harry believes it's a critical factor in maximizing the likelihood of a successful outcome for the firm's clients.

Moran's desire has always been to create a safe environment, where his clients feel respected and understood, regardless of their financial status or goals. Harry adds: "SWA goes the extra mile to allow clients to confidently and easily delegate some of their day-to-day financial decisions so they are freed up to pursue their life's dreams." [Schedule a 'get acquainted' conversation >](#)



What is your risk number?

Capture your risk tolerance and see if your portfolio fits you.



GET STARTED

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