



The Total Wealth Plan

It's about more than money — it's what money enables you to do with your life. We create straightforward financial strategies that address life's challenges, and employ Nobel Prize winning research to construct portfolios that increase your probability of success.

Our Team

We seek to serve your best interests by placing them ahead of our own. As an independent, fee-only firm, we work directly for you, not a third



OBJECTIVE, CONFLICT-FREE ADVICE BASED SOLELY ON YOUR SITUATION.

How We Help

The only thing certain about the future is that it is uncertain. Comprehensive planning and disciplined investing can reduce that uncertainty. Whether you want to protect wealth, meet your retirement income needs, or establish a charitable legacy, our approach can help.

Beyond The Numbers

We care deeply about helping you live a better, more fulfilling life with less worry and fear. It's easy to become distracted and lose sight of what actually matters to your long term success. Our firm is committed to providing simple, no-nonsense financial education without the typical media hype and hysteria. Check out our current thinking.

As a division of Vista Wealth Management, our firm serves clients across the United States from offices in Oregon, California and Arizona. We hope you will get in touch to see how we can help you.



1500 SW First Avenue, Suite 990
Portland, OR 97201
503.292.2775

Interested in
learning more?
Let's talk.

[CONTACT](#)

[DISCLOSURES](#)