PERSONALIZED WEALTH MANAGEMENT SERVICES

LEARN ABOUT OUR FIRM

OUR SERVICES

LEARN MORE

Financial Planning

Our team merges estate planning, retirement planning, income needs, insurance and all other aspects of your financial picture to ensure you stay on track to meet your goals.

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Tax Analysis & Strategy

We maintain CPAs on staff and work closely with our clients' CPAs to implement proactive tax planning solutions that minimize tax expenses in the short and long-term.

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Family Office Services

Certain clients require services that go beyond the scope of traditional wealth management including bookkeeping, document preparation, business consulting and more.

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EXPERIENCE AND PERSPECTIVE

Our advisors are experienced and our firm is tenured. Our long term approach is based

0

AVERAGE YEARS OF EXPERIENCE PER ADVISOR

+0%

LONG-TERM ANNUAL RETURN FOR STOCKS

0

YEARS IN BUSINESS

*The annual return for the S&P 500 Index from 1926-2019 is +10.0% with dividends reinvested.

WHO WE ARE

optimists and believe that the world is getting better with time.

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OUR RECENT BLOGS

SEE ALL

Charitable Contributions from an IRA?

In 2018 charitable contributions from individuals fell by 3.8%. Excluding the Great Recession 10+ years ago…

Fifth Inning Stretch

As of the end of November, the S&P 500 index had returned +27.6% for the year – a phenomenal year...

READ ARTICLE

In 1935 FDR proposed the Social Security retirement program and his staff projected that total expenditures for…

READ ARTICLE

DROP US A LINE TO LEARN MORE ABOUT WHAT WE DO

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