

Unconventional Investor can help you maximize your investment returns, minimize your financial stress, and free up your life to spend time doing what matters most.





SOPHISTICATED YET SIMPLE

Pairing our buy-and-hold strategy with a core set of carefully selected asset classes builds a diversified and sustainable portfolio. This provides our clients with the best opportunity to maximize long-term gains while minimizing the negative effects of short-term market swings.

UNCOMMONLY LOW FEES

Although frequently (and deliberately!) obscured, the various costs and fees associated with investing are one of the primary causes of underperformance. At UI, we are dedicated to minimizing all costs, which in turn flows through to our clients in the form of lower fees and higher returns.

PERSONALIZED APPROACH

No two clients' situations or needs are identical, and accordingly neither should two financial plans. We work with you to create a portfolio specifically designed to meet your family's unique financial goals. As your life evolves, we will periodically evaluate and adjust the plan as necessary.