

Analysis-Driven, Client-Focused Wealth Management



EF Invest is known for thorough independent research, long-view financial planning, superior client service and proven results.

As an independent investment adviser and manager, EF Invest provides unbiased financial advice, using its own research and analysis. We eschew short-term trends in favor of disciplined planning and long-term strategies.

Analysis-Driven, Client-Focused Asset Management

Many investors focus on recent results. We believe your financial life is about more than the past three months — or the next three. We look at the entirety of your portfolio, your risk tolerance, your income needs and your investing horizon, to ensure you are on the right path to reach your goals.

We are a fee-only registered investment adviser that adheres to the highest ethical standards. Our clients' interests always come first. We pride ourselves on providing exceptional service, tailored to each client's needs and aspirations; transparency and responsiveness are tenets of our practice.

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