

What We Stand For

We are guided by our purpose of making your financial life simpler and less worrisome. We deliver a positive experience by providing superior service, timely communication, and a focus on meeting your goals. Through sound investment guidance, we are your partner for your continued financial success.

Our Firm

DEDICATED
AND
EXPERIENCED

Philosophy

INDIVIDUALIZED
AND
EFFICIENT

Services

SUPERIOR
AND
DEPENDABLE

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TIMELY AND
ENTERTAINING

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Much
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Than It
Used To

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May 28th, 2019



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A quote we find compelling:

“A contract is not worth anything. If you need to enforce an agreement, you’re doing business with the wrong person. If someone doesn’t want to live up to an agreement, they won’t. You need to do business with individuals you like and trust. That’s your only protection. You need to develop a sixth sense about who they are.”

Jay Pritzker, Hyatt Founder

We Plan Your Financial Future

We work with clients to help them achieve their financial goals. This begins with an initial conversation that gives us a deep understanding of you and your specific circumstances.

We Invest Wisely

A successful financial portfolio takes time to construct and maintain. We believe it is necessary to monitor and make adjustments to your investment portfolio as things change in the financial markets, economy, and your personal circumstances.

You Become A Member of the Family

Through ongoing communication, you will know exactly where and how your money is being invested, and we assist you in making the adjustments required to stay current in a changing financial world.

At Albitz/Miloe & Associates, Inc., we work with two type types of clients: those who want to preserve their wealth and those who want to create more.

*Learn more about our firm's background on [FINRA's BrokerCheck](#)

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