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Spanning our ownership over 3 generations of employees to help ensure relationship continuity

is just the start. Being an SEC-regulated fiduciary and our belief in fee-only compensation

structures with our clients also ensures that we put your best interests first.

We believe in clients having full-access to the collective abilities of all our team members, rather than being served by just a single advisor. And, perhaps most importantly, we are committed to going beyond the portfolio, to understand the hearts and purposes of our clients.

We display our values-driven approach not just in what we say, but in how we serve our clients, our communities, and our fellow team members. By advancing our advice with science and getting the right people in the right positions, we are in constant pursuit of a better client experience.

We offer clients a full complement of financial services, including investment management for individuals and institutions, qualified retirement plan consulting and design, and advanced financial planning services.

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