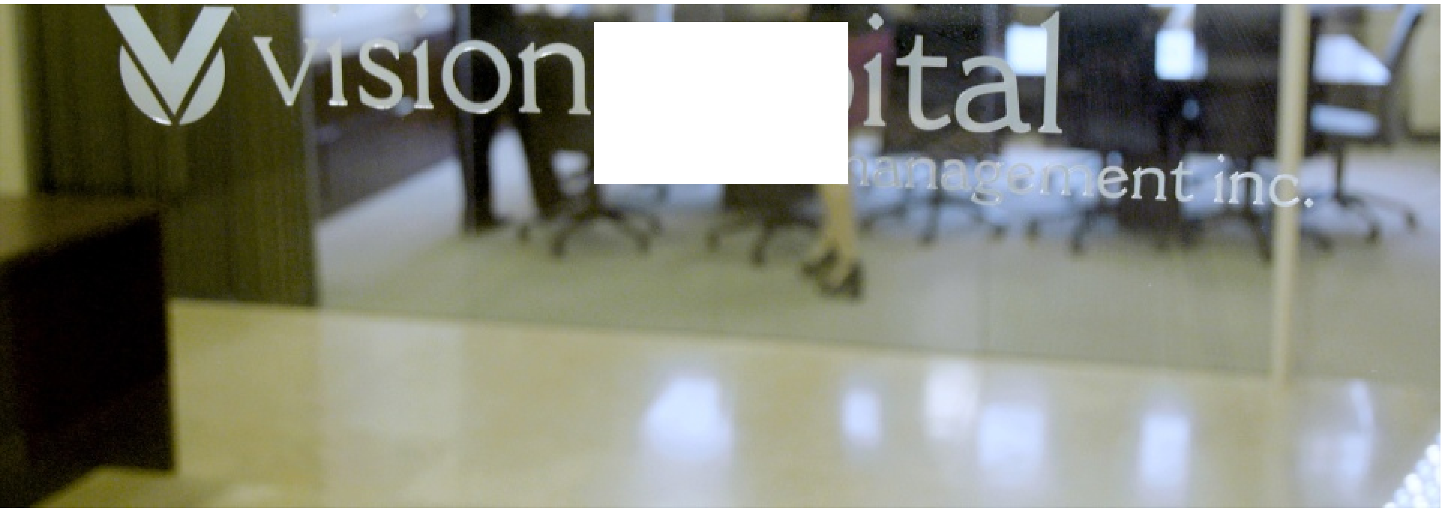
WE SHARE YOUR VISION

Because a financial advisor should be both your partner and your advocate.

LET'S GET STARTED

Our story begins in 1999 with a mother and her daughter wanting to offer their clients something different: a wealth management firm built by women where relationships matter and clients' needs come before all else.

Today, we are an established, independent, women-owned financial advisor with an unwavering commitment to our clients and their assets.



Our team is a group of smart, energetic individuals motivated to help you make the most of your finances.

As financial advisors, we believe our job is to provide a comfortable space for our clients to learn and have the tough conversations necessary to achieve their financial goals.

MEET THE WHOLE TEAM

What We Offer

As an independent, fee-only financial advisor, we aren't incented to recommend specific types of investments and are free to design a low-cost investment strategy targeted to your specific vision for the future.

We believe your investment strategy should reflect your financial goals which is why our financial planning services are included in our investment management fee.

FINANCIAL PLANNING

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Life Is About Transitions

CHANGING CAREERS

DIVORCE

BLENDING FAMILIES

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MEDICIAL DIAGNOSIS

PASSING TO THE NEXT GENERATION

DEATH

Fresh, Honest Financial Advice

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Looking for a Financial Advisor but don't know where to start?

Choosing a financial advisor is one of the most important decisions you'll make. We put together a complimentary checklist to help you evaluate your options from the type of advisor to services offered.

FINANCIAL ADVISOR CHECKLIST

Certifications and Associations

Business Advisor Analyst Member

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Email

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1 SW Columbia, Suite 915, Portland, OR 97258

Directions

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