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At Bourgeon, our relationship with you is our most valuable asset.

*Celebrating Bourgeon Capital Management's*

*20th Anniversary*

1999-2019

[Read More \(https://www.bourgeoncapital.com/20-year-anniversary\)](https://www.bourgeoncapital.com/20-year-anniversary)



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**Bourgeon**  
CELEBRATING  
THE  
CAPITAL  
MANAGEMENT  
Investment Counselors

**20<sup>th</sup>**  
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## Value of Advice

We collaborate with you to create a comprehensive financial plan, implement, and adjust it. (/value-advice-o)



## Investment Philosophy

Just as every client relationship is built on dialogue, investing is also an ongoing conversation at Bourgeon.  
(/our-investment-philosophy)



## Fin-Tech

We leverage industry leading financial technology to help guide you to financial success. (/fin-tech)



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**Bourgeon** CAPITAL MANAGEMENT  
 Ongoing dialogue is the cornerstone of every client relationship. Clients come to Bourgeon because we talk with them honestly, effectively and often. They stay with us because of trust.

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Bourgeon Capital is an independent, fee-only, registered investment advisor. We are a *fiduciary*, meaning that we act in our clients' best interests. Our goal is to help you define and achieve your unique financial goals. Questions we ask could include...

Are you saving enough for retirement?

Click Here To Begin A Plan (<https://wealth.emaplan.com/ema/LeadGen/Welcome/c1667bd5-264c-45a9-96e5-98oda2cf474e>)

Does your portfolio fit your risk profile?

Calculate My Unique Risk Number (<https://pro.riskalyze.com/embed/911124b9289086119431>)

## Our Bourgeon Team (/our-bourgeon-team)



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CAPITAL  
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[John A. Zaro, III CFA®](#), [CIC \(/john-zaro-iii-cfar-cic\)](#)

[Managing Member, General Partner \(/john-zaro-iii-cfar-cic\)](#)



(<https://www.bourgeoncapital.com/laura-k-drynan-cfar-cfpr-cic>)

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*“An Object in Motion Stays in Motion Unless Acted Upon by an Outside Force”*

-Newton's First Law of Motion

[READ MORE \(https://www.bourgeoncapital.com/market-insights-disclaimer-spring-2019\)](https://www.bourgeoncapital.com/market-insights-disclaimer-spring-2019)

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### *Giving Back to the Community*

Bourgeon Capital Management is committed to giving back to the communities where we live and work. If charitable giving is important to you and your family we can work with you to set up a donor advised fund.

[Read More \(https://www.bourgeoncapital.com/giving-back-community\)](https://www.bourgeoncapital.com/giving-back-community)



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## [Not Your Father's Retirement \(/blog-01/not-your-fathers-retirement\)](/blog-01/not-your-fathers-retirement)

by [bourgeoncapital](#) on [May 15, 2019](#)

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## [The Power of the Entrepreneur \(/blog-01/power-entrepreneur\)](/blog-01/power-entrepreneur)

by [bourgeoncapital](#) on [May 15, 2019](#)

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## Taking Care (/blog-01/taking-care)

by [bourgeoncapital](#) on May 15, 2019



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