

A photograph of a dirt path in a forest. Sunlight filters through the trees, creating a bright, glowing effect in the center of the path. The trees are tall and thin, with green foliage. The path is reddish-brown and leads into the distance.

*"If you can't explain it simply,  
you don't understand it well enough."  
-Albert Einstein*



## WHO WE ARE

At Resource Management, our passion is to make a meaningful impact on our clients lives by helping them navigate through an ever changing, complex world of investments, taxes, accounting, and economics.

RM has been and currently is a pioneer in wealth management and business planning services since its inception in 1974.

[More Info](#)

## FAMILY BUSINESS PLANNING

Family-owned businesses are unique and require advisors with specific training in the myriad of special circumstances surrounding the family business. This includes: succession planning, parent/child relationships, marriages and divorces, complicated financial relationships—as well as turf battles, shareholder control, compensation structures, and special governance issues. Without written and agreed upon governance in place, family relationships and the business itself is at risk.

[More Info](#)

## THE PROCESS

RM has been and currently is a pioneer in wealth management and business planning services since its inception in 1974. We work with closely-held business, professionals, and high net worth individuals and their families. Once a client, we formulate, design, implement and monitor their specific short-and long-term financial goals to achieve successful results. Our services are comprehensive, detailed, and personalized.

[More Info](#)

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