



☎ (239) 992-3900

## **Ascendant (ə-sĕn'dənt)**

*Moving upward or rising.*

*Increasing in prosperity.*

*A state of being in control.*

When it comes to investing and retirement planning, there are no guarantees. But, there are two certainties: shortcuts rarely work and planning requires experience and discipline. We understand the concerns people face as they plan for their future retirement. Our mission is to help you make wise financial decisions and work toward your long-term goals, combining our experience in financial planning with our disciplined and research-based approach to investing.

Rather than overwhelm you with complex investment strategies or technical jargon, our caring and trusted team of professionals connects with you by developing personalized solutions to your financial objectives using a simple and efficient approach. The result? A clear roadmap designed to guide you toward your financial and the knowledge to make informed and confident decisions.

Our clients come to us for guidance on their financial decisions and trusted recommendations. If you're ready to focus less on your finances and more on your passions in life, contact us today to learn more about how we can serve as your financial partner.

## **What's Your Risk Number?**

Riskalyze is cutting-edge technology that helps us ensure that your portfolio aligns with your investment goals and expectations.

Together, we can take the guesswork out of your financial future. Start by discovering your risk number.

Free Portfolio Risk Analysis



## Have a Question?

Name

Email

Phone

Question

**SEND**

### Contact

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