



[INVESTMENT MANAGEMENT](#)

[UNIQUE APPROACH](#)

[OTHER SERVICES](#)

[MEET OUR TEAM](#)

[NEWS](#)

[PHILANTHROPY](#)

[CONTACT](#)

# COMPREHENSIVE FINANCIAL ADVICE

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We provide holistic investment advice that encompasses our clients' total financial picture on a fee-only basis to help achieve their financial goals. As fiduciaries, we are legally obligated to act in the best interest of our clients all of the time. This duty includes providing unbiased advice that is optimal for each client's specific situation. Our comprehensive financial and investment plan includes:



Setting  
Objectives



Portfolio  
Creation



Implementation



Active  
Evaluation

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## OUR UNIQUE APPROACH

At Black Diamond Financial, our approach to investing is designed to preserve and grow your wealth. We create customized investment portfolios with the following key characteristics:



Low Cost



Risk  
Appropriate



Returns  
Optimized



Tax  
Efficient

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# OTHER SERVICES

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We take the role of Chief Financial Officer for our clients and provide an array of financial services.



401(k)  
Advisory



Estate  
Planning



College  
Planning



Alternative  
Asset  
Review



Charitable  
Giving

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## OUR TEAM

We have extensive financial planning and investing experience and look forward to speaking with you.

[MEET OUR TEAM](#)

# CONTACT US

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