

Click here to learn more about our financial professionals by visiting FINRA's BrokerCheck.



☎ (225) 761-7870

Do you have a plan or just a portfolio?

It's a valid question and one we pose to each of our clients. In many cases, we find that people concentrate on a portfolio built around saving and investing money, and that's a good start; however, *it's not a plan*.

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An investment in knowledge pays the best interest. – Benjamin Franklin



Who We Are

Years of experience have prepared us to guide you through your life transitions.

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Our Approach

We create strategies that are tailored to your needs and goals.

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Our Philosophy on Managing Money

Trust. Honesty. Integrity. We believe values matter, and we live by ours every day.

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Technology Based Solutions

Built on a Nobel Prize-winning framework, Riskalyze quantifies the semantics of the financial advice industry, replacing confusing and subjective terms like “moderately conservative” and “moderately aggressive” with the Risk Number, a number between 1 and 99 that pinpoints a client’s exact comfort zone for downside risk and potential upside gain. We then build an investment portfolio to match the client’s Risk Number and chart a clearly defined path to the client’s goals. Riskalyze was twice named one of the world’s 10 most innovative companies in finance by Fast Company Magazine and has appeared twice on the Forbes FinTech50 list. You can learn your Risk Number by taking the following brief questionnaire

What's Your Risk Number?



THREE RISKS THAT CAN DAMAGE YOUR RETIREMENT SECURITY
TIMING RISK - What if I pick a bad year to retire?
INFLATION RISK - Will my income keep pace with rising prices?
LONGEVITY RISK - Will my income last my entire lifetime? Learn how we answer these questions, and more.



Our Unifying Principals

- Build a Plan
- Communication
- Behavioral Management
- Goals Based Portfolio Management

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Come Visit Our Office



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