


[About](#)
[Services](#)
[Approach](#)
[Resources](#)
[Contact](#)

*independent and objective –
obligated to no one but*

our clients

who we are

Trellis Wealth Advisors is a private, boutique investment office focused exclusively on serving the unique financial needs of our individual clients. Not on our profits. Not on our prestige. But on you, your investment objectives, and your ongoing financial health.

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what we do

We provide clear, candid information that helps individuals and families make informed investment decisions. We don't sell products or take commissions. We simply serve as an advocate for our clients to help them develop, implement, and monitor investment plans to achieve their long-term goals. [read more ▶](#)

how we do it

We construct custom portfolios based on an investment philosophy rooted in facts and common sense. We don't have any magical mathematical models, secret formulas, or hot stock tips to share. We do, however, have experience, expertise, and an unwavering commitment to treat you with absolute honesty and respect. [read more ▶](#)

A Lesson In Investing Simplicity
Feb. 2017
[more info](#)

Buffett Advocates Index Funds
May. 2016
[more info](#)

About

[Our Origins](#)

[Our Differences](#)

[Our People](#)

[Q&A](#)

Services

[Overview](#)

[Investment Strategy](#)

[Asset Allocation](#)

[Investment Selection](#)

[Consolidated Reporting](#)

Approach

[Our Philosophy](#)

[Our Rationale](#)

Resources

[Food for Thought](#)

[Recommended Reading](#)

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[Terms of Use](#)

[Q&A](#)

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