

# Preserve. Save. Defend.

## We Serve People Just Like You

We serve people just like you who are looking for an experienced, proven money management partner with a vested interest in stabilizing and improving your financial future. We know personal finances are personal and recognize no one client has the same needs as any other, which is why our approach is totally hands-on and completely personalized.



Young professionals, established business people, retirees




New and maturing families



Financial novices and multimillionaires





Singles, divorced people, widows and widowers



East-coasters, west-coasters, northerners and southerners

**OUR SERVICES**

Check the background of these investment professionals on [FINRA's BrokerCheck](#)

## Our Name

Our name represents exactly what we do for our clients. Saos derives from the Greek "sozo" and "soterian," from which SOS was derived. The word literally means "bring... safely, ensure salvation, do or make well, preserve, recover, restore, to save." We have a passion for producing strong financial results with the fewest unexpected consequences possible.

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### CONTACT US

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