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Forbes BEST-IN-STATE WEALTH ADVISORS 2019 SHOOK RESEARCH™

Our Mission Statement

Our focus is on relationships and obtaining an understanding of each client's personal vision. Our commitment is to help develop, alongside our clients, detailed financial strategies, taking into account their needs and objectives, willingness to assume risk, current and future income needs, and potential tax liabilities. We believe relationships are based on trust and intend to earn that trust through hard work, honesty, service, and a fair cost.

***2019 Forbes Best-in-State Wealth Advisors -** Ranking algorithm based on industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC, which does not receive compensation from the advisors or their firms in exchange for placement on a ranking. Investment performance is not a criterion.

Calculators

Tax-Deferred Savings
Compare the potential future value of tax-deferred investments to that of taxable investments.

Estate Taxes
Use this calculator to estimate the federal estate taxes that could be due on your estate after you

Newsletters

Taking a Team Approach to Retirement Savings
Even if you and your spouse have separate retirement accounts, you may still be able to craft a unified savings and investment strategy.

Insurance Strategies: Giving Old Life Insurance a New Purpose

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Map and Directions

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Required Minimum Distributions
Estimate the annual required distribution from your traditional IRA or former employer's retirement plan after you turn age 70½.

Home Affordability
Estimate of the maximum amount of financing you can expect to get when you begin house hunting.

More Calculators →

A 1035 exchange may allow a permanent life policy to be traded for a more suitable insurance product.

Considering Preferreds? Proceed with Caution
Considering investing in preferred stocks? This overview examines the risks and potential benefits.

IPOs: Consider the Risks Behind the Hype
Discover why it might be worth waiting for a record of financial results before investing in an initial public offering.

More Newsletters →
