



We actively manage retirement money

professional, independent and working solely in your best interest

 **Portfolio Management**
Independent & Impartial

Working to grow and protect our clients' wealth for more than 25 years in Saratoga Springs, Cooperstown and St. Augustine, FL

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 **401k & 403b Plans**
Fiduciary Advisors

Helping employers & non-profit boards improve and monitor their 401k / 403b plans using a sound fiduciary process.

[CONTINUE READING](#)

 **Educational Events**
Seminars & Workshops

We regularly hold educational events for our clients and prospective clients on a variety of topics such as Retirement and our Social Security.

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