



Plan. Perform. Prosper.

Put the Vista Advantage to work for you.

The Vista Advantage

Plan. Perform. Prosper. The three pillars of our award-winning approach serve one purpose: to give you the highest probability of success. Utilizing thoughtful financial planning, **optimal investment portfolio construction**, and discipline, the Vista Advantage is designed to protect and grow your wealth. So you can focus on what's important—living your life fully.

[Learn More](#)

The Optimal Portfolio

At Vista, we set you up to take advantage of the full market's potential—and minimize taxes, costs, and worry along the way.

This whitepaper shows you how:

[Get Vista's Guide to your Optimal Portfolio](#)

Our Team



While we'd prefer to talk about who you are and what matters to you, we understand you may want to know a thing or two about us. A read through our bios may just confirm we're the group of passionate financial advisors you've been looking for.

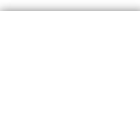
Meet Us

How We Help

We do something different here. We work for you—not Wall Street. As independent and fee-only financial advisors, we have no commissions vying for our attention. So we're free to listen and help design a financial plan to protect your wealth, prepare for retirement income, diversify a concentrated investment position or establish your philanthropic legacy. This is what we do to help stack the odds in your favor.

[Learn More](#)

Our Story



Our clients, friends and professional partners tell us we've got something special going on here in Portland, Oregon—and we tend to agree. Our unconventional approach to investing influences everything we do and, ultimately, has defined our company culture.

[Learn More](#)

The Simple Truth (Blog)

Welcome to a place free from the bias of Wall Street. Our blog is devoted to providing information which gives you the very best chance for financial success. Where we pull back the curtain to reveal what really matters. Where you can find answers without getting a hidden agenda in return.

[Our Blog](#)

Put the Vista Advantage to work for you.

We manage globally diversified portfolios that seek to minimize costs, taxes, and worry for individual clients with more than \$2 million to invest.

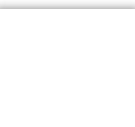
Get Started

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Ready to get started? [Contact](#)

Great, let's talk.

Build your wealth with more insight and less hype. Get our newsletter.



email

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Client Login



Important Disclosures

