

WE ARE YOUR ADVOCATE.
WE HELP YOU MAKE INFORMED DECISIONS
SO YOU CAN LIVE A MORE FULFILLING LIFE.

Ranked in the **top three** 2018, 2017 and 2016 RIA Firms by Barron's.
Learn More

WEALTH ADVICE FOR WHAT'S IMPORTANT

MY RETIREMENT MY FINANCIAL LIFE EDUCATING THE NEXT GEN WEALTH TRANSFER HIGHER EDUCATION

Plan for Potentially Unexpected Retirement Costs

Depending on your long-term goals, dreams and health care needs, you may ne...

Plan Ahead for Medicare

There are many variables to deciding which type of Medicare coverage and po...

A Starting Place Planning For Dementia And Alzheimers

Dealing with Alzheimer's or Dementia can be challenging. Consider planning ...

Catch Up Contributions

Saving as much as you can for retirement.

WEALTH ADVISOR OFFICES:

OVERLAND PARK | NEW YORK CITY | PITTSBURG | TULSA | OKLAHOMA CITY | AMARILLO | DALLAS |
SCOTTSDALE | SAN DIEGO | OMAHA | ST. LOUIS | CHICAGO | BROOKFIELD | INDIANAPOLIS |
CINCINNATI | STATE COLLEGE | MADISON | MANASQUAN | PALM BEACH GARDENS | HIGHLANDS

RANCH | SAN FRANCISCO | NOVI | MINNEAPOLIS | AUSTIN | HOUSTON | CHARLOTTE | DES MOINES |
NEW ALBANY | BELLEVUE | SIOUX FALLS | LOUISVILLE | CORTE MADERA | PHILADELPHIA |

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