



## Harmonizing Goals With Results

### Consultative Approach

We understand what is truly important to each client and tailor a specific plan to their needs.

By collaborating with other professionals, we are able to serve as a single point of contact ensuring our clients feel confident about their financial future.

### Vast Capabilities

Our knowledge, teamwork and specialization bring perspective to our sound strategies. Leveraging our experience, allows us to consistently learn and evolve.

By providing each customer with a customized portfolio and plan, clients know they have a centralized source of trusted advice.

### Commitment to Relationships

We are committed to a high level of accessibility, responsiveness and follow-through in communicating with clients on their financial progress.


We personally engage each client which we believe creates comfort and trust that comes from a long term relationship.

[Our History](#)

[Our Services](#)

[Your Team](#)

## MARKET COMMENTARY

 [April 29, 2019](#)

[April 22, 2019](#)

## Contact Us

Telephone:  
(330) 434-2000

Fax:  
(330) 665-1515

**April 15, 2019**

**Commentary Archive**

**4100 Embassy Parkway  
Suite 100  
Akron, OH 44333-1783**

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