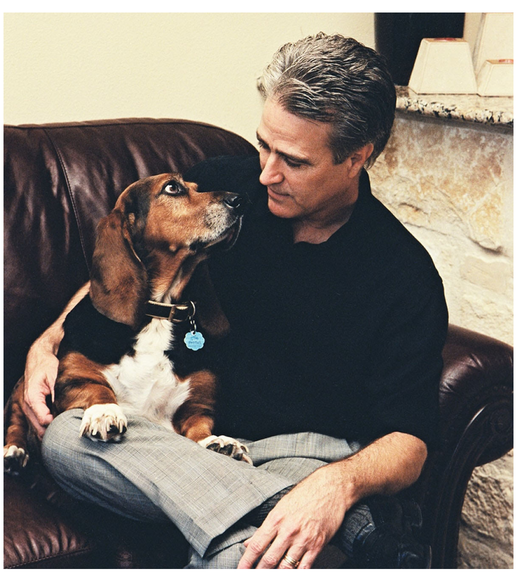
*"All success comes from doing the right thing for the client"* - Brent Forrest



**The investment business** has never been user-friendly. I wanted to build a practice that would serve clients the way I would want if I were the customer. While it has taken years, and we continue to refine and improve, we have largely succeeded in reaching our goal. We do for our clients what the big firms can only advertise that they do. We know our clients, care about them, and in many cases, make a profound difference in their lives.

Moreover, we do it at a much lower cost than industry averages. I wanted to build an investment practice that would not need to advertise or solicit for business. I wanted clients to be so well served that they would stay with us for years, and be our only marketing department by recommending us to others. The results have exceeded my expectations.

Someone you know and trust probably sent you here. Please take a moment to learn more about us and see if we might be right for you.

## What Sets Us Apart

**We are different from most all others in our field. Here are seven reasons why:**

### Independence

We do not work for any investment firm, insurance company, or bank. We are an independent Registered Investment Advisor held to the highest fiduciary standards. We work strictly for our clients.

### Depth of experience

We've been doing this for a long time and have learned and unlearned a great deal. We are able to protect you from the flood of news, Wall Street's wiles, investment fads, unscrupulous sales tactics, and often, your own emotions.

### Low cost

We provide highly attentive personal service, yet our fees are much lower than industry averages.

### Consistent investment philosophy

We have firm convictions and disciplined practices regarding what works and what does not work for serious long-term investors. We believe in fundamental value investing. We do not practice market timing or place tactical “bets”.

### Clear communication

We speak plain English. Any sensible idea can, and should be, communicated in clear, unambiguous language.

### Absolutely no sales agenda

We have a well established family of clients. We have no need or desire to pressure anyone into doing business with us. At no time does any prospective or existing client experience sales tactics, overt or subtle.

### We make it easy

Keeping your financial house in order is hard work. It can be complex, time consuming – even intimidating. We love to hear our clients tell us, “thank you for making it easy”.

# Our Commitment to Clients

We are dedicated to offering a select group of families and individuals an exceptional investment and retirement planning experience tailored to their needs. Our strategically managed portfolios are designed to get you to your destination whole. We pledge to know you as a person, not as an "account" and to communicate good service with integrity and courtesy. We deliver the best we can at reasonable, competitive costs; knowing that both parties must profit to maintain a lasting relationship.

Learn More

Check the background of this investment professional >>>

BrokerCheck by FINRA