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Building, Managing and Preserving Your Wealth Plan.

~ CLIENT ACCOUNT ACCESS (section5.cfm) ~

As an independent financial advisor, my loyalty is with you. With that philosophy in mind, you receive objective comprehensive advice that is not tied to any specific product or service. My focus is to uncover opportunities to guide diversification, performance and reduce risk for my clients.

Making solid financial decisions doesn't have to be confusing. Our process begins with a comprehensive independent analysis of your entire financial profile allowing me to design a thoughtful and innovative portfolio construction that delivers a customized strategy to meet your individual financial planning needs.

Using extensive knowledge and experience, along with a commitment to ongoing professional education, allows me to synthesize the evolving and complex nature of wealth management strategies. Using simple, proven techniques, I will guide you in choosing the best strategies throughout your journey in planning for, and living, your retirement goals.

I welcome the opportunity to set up an initial phone consultation or to schedule an in-person meeting to review your portfolio.

Tom

Delivering a personal connection to develop a stronger financial future for you.

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