



## Our Philosophy = You

Count on our team to guide you to your goals. Simplify your personal or financial stewardship life. Fiduciaries, on your side.

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## Wealth and Life Strategy

Personal wealth guidance to secure financial independence and life goals. Your unique financial destination – get & stay there.

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## Fiduciary Guidance

Objective fiduciary support & process management for 401(k)/retirement plans & endowments. Serve others, protect yourself.

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## 4 ways business owners can plan for college savings & financial aid

If you have children approaching their college years and you own a business, you have more opportunities than others to manage your assets and income to save and pay for college. One of the most ...

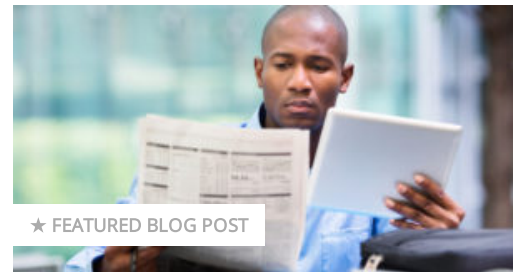
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## Creating the future super savers of America: inspire the next generation to save for retirement

Contribution by Margaret Hiller, CFP®, CPC Last month was Financial Literacy Month which prompted a flurry of articles on the retirement crisis in the U.S. One noted that the “average” retirement savings amount, paltry though it is, ...



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## Do you suffer from investment FOMO? The periodic table of investment returns can help.

As a business owner you probably do not have the time, inclination or energy to research and anticipate what the right mix of investments is for your personal portfolio. Yet, with daily hype from the ...

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**The 3 critical agreements  
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**When boring is good**

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