

YOUR TRUSTED FINANCIAL ADVISORSM

The Compass brand is a promise to our clients; a promise of trust and integrity that we are absolutely confident we can deliver.

Clients can confidently trust that their interests come first. It's basic, and maybe old fashioned, but what could be more important?

WHY COMPASS?

operational structure that is all about safety of assets.

We do not hold clients funds or securities. We partner with strong, national-level companies like SEI Trust (NASDAQ symbol: SEIC) and Pershing, a Bank of New York Company.

based on a culture of strong ethics, disclosure, and compliance. We invite anyone to browse through our disclosure section on this site.

advised by a Trusted Financial Advisor. We deliver a balance between size and strength, and personal attention.

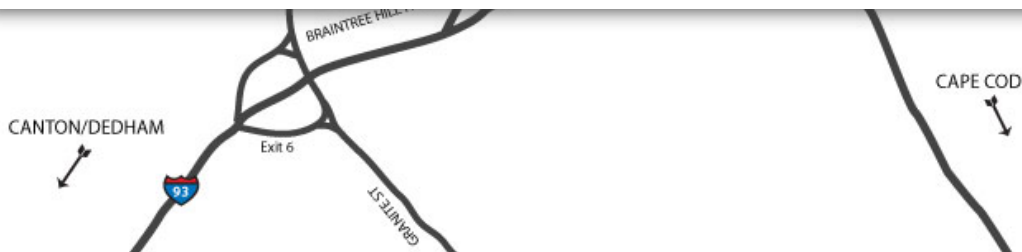
investor protection measures and regulatory compliance programs so that our clients can feel confident about the safety of their assets and the quality of our advice.

Our management team is experienced and averages over 30 years in the profession, and is active in the investment and financial planning communities. Our staff is licensed, highly skilled, and averages over 30 years experience in financial services.

[MEET THE TEAM](#)

world-class strategic partners like SEI Trust and Pershing, and local responsiveness and personal attention. We are a well-sourced company with consultative roots, which filters through in our culture. We know how to listen and deliver quality solutions for our clients' needs.

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VISIT

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