



## WELCOME TO TRUECOURSE INVESTMENT

We all need guidance. Ancient mariners laid their courses by the stars in the heavens. Early pioneers would fix their sights on a distant point to make certain they traveled in as direct a path as possible. Today, modern passenger jets use sophisticated beacons and radar to keep them on track to their destination. It's the same principle when you are trying to achieve your financial goals.

TrueCourse Investment Management was founded on basic principles like honesty, integrity, open communication and experience. We know that when you look for guidance it must come from a trusted source.

There are keys to investment success that increase the probability of arriving at your chosen destination and these keys form the foundation for our advisory services.

We work to first understand your needs and financial goals, whether its retirement income, funding college or other financial demands. Coupled with that is the very personal assessment of your tolerance for risk. The result is a customized approach to developing an investment plan that may increase your opportunity for success and at the same time reduce the stress in your financial future.

A deep understanding of the nature of capital markets, economic cycles, risk mitigation through diversification, investment alternatives and modern portfolio theory enables us to provide the guidance you need. At TrueCourse Investment Management we keep our eyes on the horizon and help individuals, families, businesses and organizations define their destination and set their best course of action... their TrueCourse.



## Wealth Management

TrueCourse Investment is all about helping you work toward your financial goals.

[Learn more](#)



## Retirement Planning

Whether you are already in retirement or approaching this important new chapter in life, we all ask the same questions.

[Learn more](#)



## Financial Planning

You know the old adage about “those who fail to plan... plan to fail?” Well, it's true.

[Learn more](#)



## Helpful Content



## A Primer on Irrevocable Life Insurance Trusts

Irrevocable life insurance trusts can be important tools that may accomplish a number of estate objectives.



## A Living Trust Primer

Living trusts are popular, but their appropriateness will depend upon your individual needs and objectives.



## Does Your Child Need to File an Income Tax Return?

When your child has income, there's a good chance that he or she will need to report it and pay taxes.

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