

Welcome to Mt. Juliet Advisors!

We know how important your family's future is to you. We also know that unreliable or biased financial advice could put that future in jeopardy. That's why we go the extra mile to earn your trust. Our wealth management is fee-based, not driven by commissions. As an independent financial advisor, David can offer a full range of investment options – not simply the products of one company.

Informed Decision Making

Making the right choices in life starts with knowledge – understanding the cost and benefit of each option and knowing which options can help you build a legacy. We will strive to give you the knowledge you need to make appropriate financial choices for you and your family. We focus on addressing the needs of families – and we're committed to working toward making and keeping you independent.

Keeping you independent

Our first priority is risk management. In finding customized, appropriate solutions to your financial issues, we'll help you plan to maintain control of your income, and manage the impact of taxes on your assets. We'll help you to create a lasting legacy – through retirement and estate planning that strives to meet both your needs today and the needs of your children and grandchildren.

Take the first step today!

Give your finances the responsibility that they deserve. Turn to the experienced professionals who take your family's future as seriously as you do. [Contact us today.](https://www.mtjulietadvisors.com/contact)
{<https://www.mtjulietadvisors.com/contact>}

Contact

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