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**We help you Balance your life  
not just your investments**

**The Human Element**

01:24 |

# Why Choose Us

01:32 |



(/who-we-are)

## Who We Are (/who-we-are)

*Fiduciary-level Advisors*

A firm founded on the philosophy that life is about much more than just money.



(/our-clients)

## **Who We Work With (/our-clients)**

*Individuals and families*

Our clients are interested in planning for life's major events. They want to work with someone they trust, and someone who knows that their life is about much more than just money.



(/what-we-do)

## **What We Do (/what-we-do)**

*We simplify your life*

We help you reduce the stress that surrounds organizing and managing your finances.



(/why-were-

different)

## Why We're Different (/why-were-different)

*Exclusively for you*

Unlike most large financial firms, there is no middleman or corporate office offering us contests, bonuses, or trips to Tahiti to sell more of their favored product. Nothing comes before our loyalty to you.



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## Do You Have Enough to Retire?

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**Can You Afford College?** (https://urldefense.proofpoint.com/v2/url?  
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## Blogs & Articles

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### **Retire to Happiness: Tips to Thrive in the Next Chapter of Life (/blog/retire-happiness-tips-thrive-next-chapter-life)**

[\(/blog/retire-happiness-tips-thrive-next-chapter-life\)](#)

Here's a thought: retirement doesn't mean the end. It doesn't mean an end of self-importance or purpose, it just means a new chapter—a paradigm shift of what life is beyond long days and meetings and bosses. Unless you own your own business, and even then, you are not your business.

[Read more \(/blog/retire-happiness-tips-thrive-next-chapter-life\)](#)

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## **Will It to be So: Things to Consider for a Strong Will (/blog/will-it-be-so-things-consider-strong-will)**

(/blog/will-it-be-so-things-consider-strong-will)

Answer this riddle: what's the one thing that will eventually happen to everyone, but generally, no one wants to discuss? Death is a subject that immediately conjures up all sorts of emotions because, let's be honest, the absence of being IS emotional. But, death is also cause for practicality.

[Read more \(/blog/will-it-be-so-things-consider-strong-will\)](/blog/will-it-be-so-things-consider-strong-will)



## **Your Longevity Compounds the Inflation Risk of Your Retirement Income (/blog/your-longevity-compounds-inflation-risk-your-retirement-income)**

(/blog/your-longevity-compounds-inflation-risk-your-retirement-income)

It has only been since the Baby Boomer generation began to cross the retirement threshold that we've had to seriously confront the new challenge of our longevity.

[Read more \(/blog/your-longevity-compounds-inflation-risk-your-retirement-income\)](/blog/your-longevity-compounds-inflation-risk-your-retirement-income)

# **Let's set up some time to talk today.**

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