'Your Plans and Dreams Are Our Goals'

A Wealth Management Advisory Firm

"Would you tell me, please, which way I ought to go from here?"
"That depends a good deal on where you want to get to…"
"I don't much care where."
"Then, it really doesn't matter which way you go…"

— Lewis Carroll, Alice in Wonderland

By taking time to think about and make your Plans, the right investments will automatically reveal themselves, and the wrong ones will too.

With your Plans and Dreams as our primary goals, we guide you through the Planning Process and create and manage the investment strategies tailored to your time horizon and risk tolerance. Our approach provides you with peace of mind, confidence, and realistic expectations.

We are experts at creating and managing tax-efficient, risk-adjusted investment strategies that will help you get there without losing sleep at night. We do this through ongoing communication, our active involvement, by keeping you informed, and working closely with your other advisors.

With over 24 years of experience, we are independent experts, not bound by any bank, brokerage house, or insurance company. Our simple goal is to always do what is in your best interest using the best and most sensible ideas, to provide you and your family with unbiased investment solutions that will help you achieve your Plans, your Dreams.

The Goal

We help you separate your short term goals of up to 18 months from longer term goals of 2 to 5 years and more than five years.

We understand that these time-frames can be moving targets, but our experience tells us these steps are key to building a strong foundation for your Investment Plans and Strategies.

Once we complete these steps, we are able to build, implement, and manage strategies for each.

The Process

We craft risk-adjusted, tax-smart portfolio strategies suited specifically to your goals. We review these with you. Once approved, we implement your investment strategies. We actively monitor your investments, and provide you with regular reviews.

This Process assures that you stay informed, and that we stay on-track as your needs evolve and as markets change. Most of all, Our Process provides you with the satisfaction of knowing you are taking care of your financial needs, and as a result, a good amount of peace of mind.

In our Reviews, we often ask our clients, 'Is there anything about what we are doing or how we are doing it that keeps you up at night?'

The Plan

We integrate Your Financial Plan & Investment Process and work closely with your CPA and Attorney. This Process keeps your plans and investments up to date and on-track to reach your Goals.

Who we are -

A great fit begins with a good introduction. Click below to find out a little bit about Mt. Baker Capital llc, a wealth advisory firm based in Seattle, Washington.

ABOUT US (/ABOUT-US)