

Celebrating Over 30 Years of Service

When was the last time your financial  
advisor looked at your tax return?

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Helping clients pursue their life goals is what  
we are about.



## Fiduciary Advice

We are a team of Certified Financial Planner licensees and qualified planning staff. We provide simple, proven strategies that seek to help our clients make the most of their money while they pursue their goals.



## Clear Vision & Direction

We specialize in providing investment and tax advice for clients seeking financial independence and security.

SEE WHAT WE CAN DO FOR YOU

# Wealth Management You can Trust

Financial Planning

Tax Strategies

Wealth Management

401(k) Plans

## The Big Picture

You likely have several financial planning pieces in place—you pay taxes, invest at least a portion of your savings, have some insurance, and maybe you have done some estate planning and retirement planning, but chances are each of these pieces was developed independently and at different times in your life. Is it any surprise then that you're unsure if you're on the right track and making all the progress you could be?

We'll ask you lots of questions, including:

- What does your ideal life look like?
- Will you be able to retire with the lifestyle you want?
- Who is deciding what happens to everything you've accumulated when you die—you or the state?
- Are you funding your child's education at the expense of your future?

SEE WHAT WE'RE ALL ABOUT

Your Money. Your Unique Journey.

Our Clients

Our Team

## Navigating Your Financial Road Map: Where Are You?

### Building a Foundation

Just married. New job. Baby. Home purchase. When it comes to finances, you just want to know where to start and where to go from here. You want technology efficient platforms but the ability to talk to someone who knows you, your situation and also knows what they are talking about.

### Enjoying my Earnings

You made it. As an established professional, you're reaping the benefits of a flourishing career and may have kids near or at college-age. Perhaps you've been through the financial planning process before, or maybe you've procrastinated getting started. Regardless, now is the time to ensure your financial plan is working efficiently or help you create one that will.

### Living on my Accumulation

Accumulating a nest egg through savings, inheritance or other means can greatly improve your financial well-being when coupled with sound financial advice. Right now, you may be concerned about maintaining your lifestyle, preserving what you have and protecting yourself against unknown risks. Navigating financial independence can get

MAYBE YOU ARE HERE, MAYBE YOU ARE SOMEPLACE DIFFERENT. HOW CAN WE HELP?

LEARN HOW WE CAN HELP

## Get In Touch

While every conversation is different, you should expect to cover some general information and get a sense of what it's like to collaborate with us.

NAME

EMAIL

PHONE

MESSAGE

Send

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**Monday - Friday**

**9AM - 4PM**

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JOIN OUR MAILING LIST

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Join

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