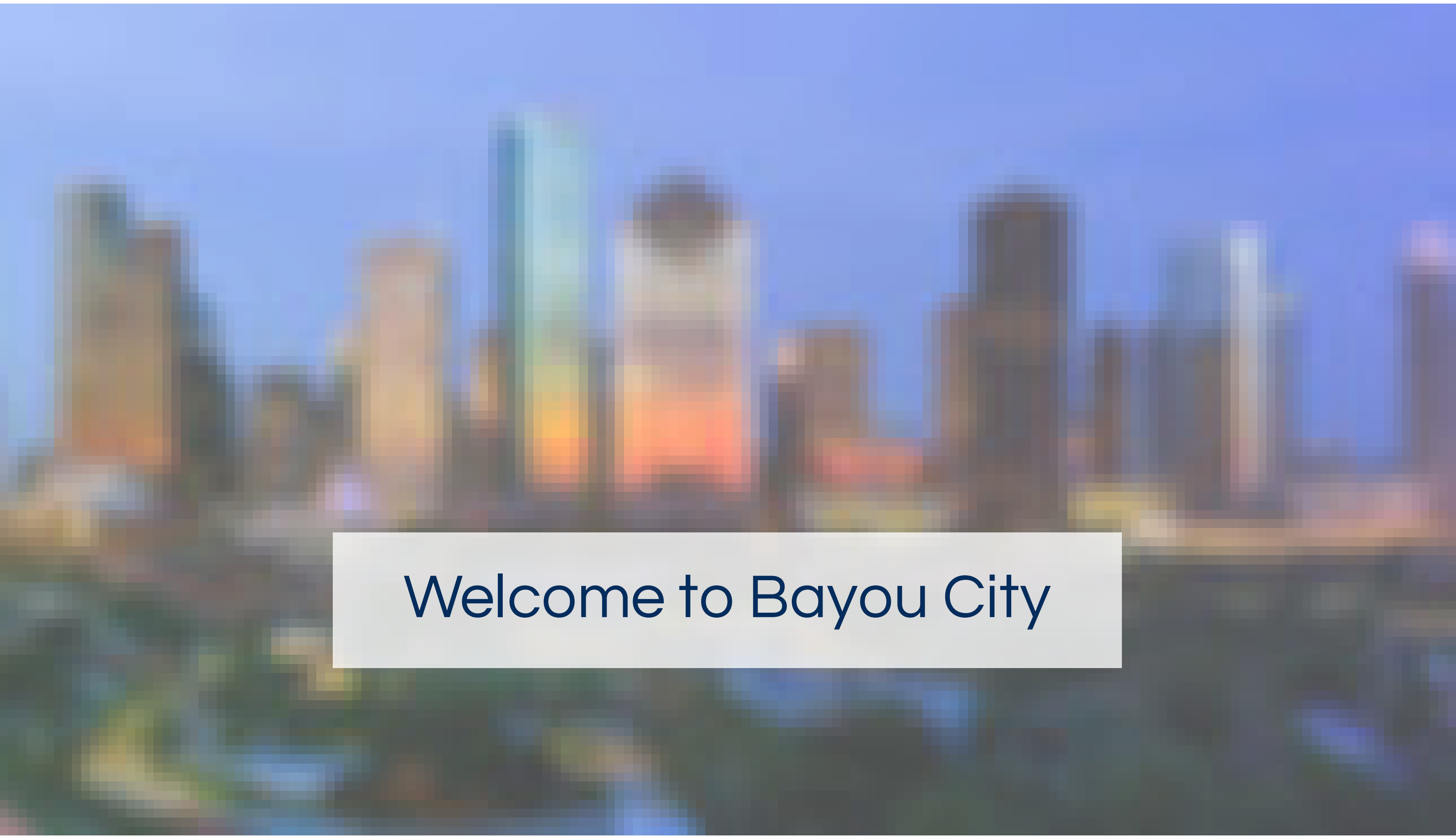


As an **independent**, **fiduciary, & fee only firm**, we help our clients meet their financial goals while treating them with integrity and managing their assets as we would our own.

Our Process

Let's work together to create a personalized plan that suits your needs.

Discover

In a one-on-one consultation, we'll review your goals and objectives.

Then, we'll draft a **Blueprint**—a **personalized road map** that provides relevant advice and information for the solutions you need.

Advise

We'll review your investment objectives and guidelines with you.

As a **fiduciary**, you can be sure that we're always acting in your best interest. Because we're a **fee-only firm**, we're free from sales goals.

Manage

Our team has more than **75 years of combined experience** in finance and wealth management.

We'll use that know how to build you a portfolio that strives to meet your goals within your time line and risk tolerance.

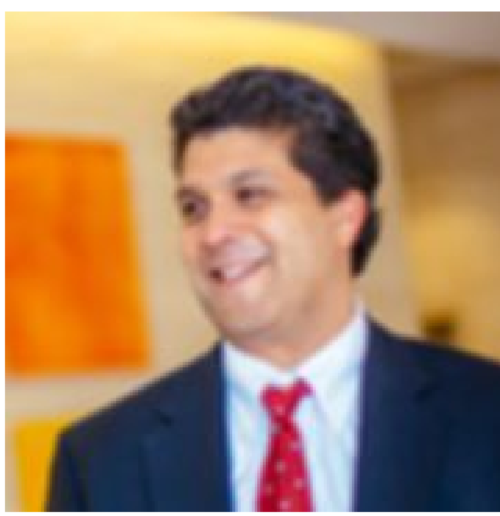
Monitor

We have relationships with Fidelity and Schwab to provide you with **transparency** and investor protection. Plus, we take the time to keep you informed.

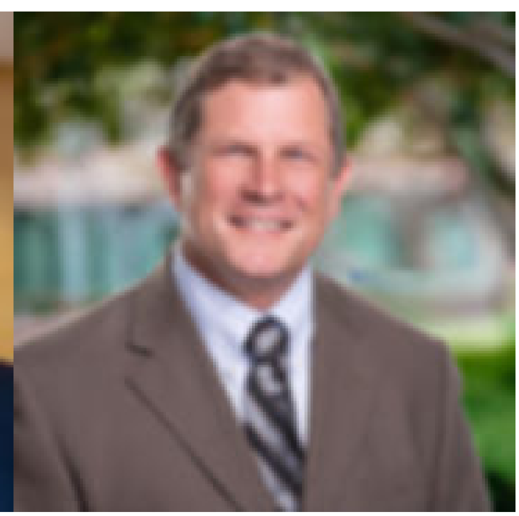
Our technology, personal meetings, and reports will help you **track your progress** every step of the way.

Our Team

Diana Blair
President



Travis Verdin
Director of Gulf Coast



Andy Nugent
CFA®, Director of Investments

More

Get In Touch

We know that no two clients are alike. Get in touch today for a personalized wealth management plan that's just right for you.

Contact

Disclosures