



Merit

FINANCIAL ADVISORS

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☎ 407.661.1225

LIFESTYLE BASED PLANNING

You have goals, we have experience. Together, we can chart a course to pursue your financial success.

LEARN MORE →



EXPERIENCE MATTERS

As a fiduciary, our focus is to provide reliable and objective financial advice by establishing a genuine and long-lasting relationship with our clients. Our team collectively has more than 80 years of experience in the financial services industry and we specialize in a range of financial matters in all life stages.

Whatever your goals, we can help you put together a plan with minimal hassle and maximum results.

[LEARN MORE ABOUT US](#) →



OUR APPROACH TO PLANNING

OUR SERVICES RANGE FROM FINANCIAL PLANNING TO INVESTMENT MANAGEMENT. NO MATTER WHAT, THOUGH, OUR FOCUS IS ALWAYS YOU.

OUR PROCESS

We create strategies that are tailored to your needs and goals.

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OUR SERVICES

Years of experience have prepared us to guide you through your life transitions.

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OUR PHILOSOPHY

Trust. Honesty. Integrity. We believe values matter, and we live by ours every day.

LEARN MORE →

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IS THIS YOUR FINANCIAL PLAN?

“A goal without a plan is just a wish”

- Antoine de Saint-

Exupery

French writer

DO YOU KNOW YOUR RISK NUMBER?

Riskalyze is cutting edge technology that identifies your acceptable levels of risk and reward. Using this tool, we ensure that your portfolio defines your investment goals and expectations.

Together we can take the guesswork out of your financial future.

Free Portfolio Risk Analysis



TELL US HOW WE CAN HELP YOU TODAY

Name

Email

Phone

Question

SEND →

CONTACT

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