

Your Trust & Best Interests

A different kind of experience...

Not only are the people, education, and experiences in our firm very different from that of other financial firms, we have chosen a business model and compensation structure that underscores our commitment to always put your best interests first.

Fee-Only

We get paid only by you, NOT from the sale of any financial or insurance products.

Independent

Local and not affiliated with any other firm or franchise.

Lifelong Planning

Starts with your values, your goals, your situation and when things change, we adapt.

Six ways you'll see the difference

Tax-Integrated Investing

It's not what you *earn*, it's what you *keep* (after taxes) that matters.

Proactive Implementation

We lead the effort to fully implement your plan and monitor its progress.

No Need to Start Over

You've made many *astute* moves before you engage us - we build on your foundation.