

Holistic Planning

We begin by first meeting with our clients and reviewing the current investment situation. We use a holistic planning technique in order to build the best investment plan for our new clients. We are not interested in selling investment products. Instead we incorporate the client's goals, such a retirement or college savings as our benchmarks for success.

Once we meet with the client, we make a financial plan and start building a custom portfolio. Instead of selling a pie chart of investment products, we focus on our client's goals and objectives.

We also like to work with our client's accountants, estate attorneys, and other professionals to provide the best overall investment plan.