

Our mission is to simplify and improve the financial lives of our clients. Our goal is to provide the peace of mind that comes from having a thoughtful plan in place, with a trusted team to help guide them along the way.

Financial Planning Services

- Goal setting and monitoring
- Cash flow and retirement income planning
- Income tax planning
- Employee benefits review
- Estate and legacy planning
- Charitable giving strategies
- Insurance needs assessment and review
- College saving and funding
- Intergenerational planning and family meetings
- Creation and annual update of your *Personal Financial Statement*
- Provide annual wealth summary document and action items checklist
- Collaboration with your other advisors—accountant, attorney, banker, and insurance agent



Investment Management Services

- Strategic asset allocation and rebalancing
- Tax efficient investing—tax loss harvesting, asset location
- Values-aligned investing
- Investment selection and monitoring
- Objective coaching and investor education
- Negotiation with custodians and investment managers to minimize fees
- Comprehensive performance and tax reports
- Securities backed lending and liquidity strategies
- Annual/semi-annual/quarterly review meetings per your preference
- Online access of your portfolio and performance data

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