Our Business

The Way We Do Business

Every one of our clients has a plan. Every plan is tailored to each client.
As such, we ensure that our relationship begins with a comprehensive review of your goals, risk tolerance and lifestyle. After the plan is in place, we routinely measure the results and re-evaluate your goals to adjust the plan accordingly.

Setting Your Financial Objectives

To set your financial objectives, we develop a comprehensive understanding of your present financial resources, liabilities and objectives, as well as the risk level with which you are comfortable.

Developing Your Asset Allocation

We believe that asset allocation is one of the most effective investment techniques investors can employ. Historical data has shown that the correct asset allocation policy can provide diversification of your portfolio, enhance returns, lower overall portfolio volatility and position your portfolio to take advantage of developing investment opportunities.*

Selecting an Investment Manager

We use a comprehensive process designed to identify qualified investment management talent as well as to reconfirm regularly the qualifications and capabilities of firms currently managing our clients' assets.

Ongoing Review

The final step of our process is a comprehensive review encompassing your investment objectives, your investment portfolio's performance and the investment manager's progress toward meeting your investment goals.

Principles of Professionalism

Our commitment to you is to put you and your interests first.
Seek to understand you, your personal finance needs, as well as your goals and values.
We want to help you fully comprehend your investment choices so that you make well-informed decisions based on what's right for your situation.
We will ensure that your concerns are our top priority.
We want to be available to spend ample time with you do discuss your portfolio and any financial matter that may affect you.

*Diversification does not ensure against loss.