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Dow	10318.16	-14.28	4:31pm
Nasdaq	2146.04	-10.78	5:30pm
S&P 500	1091.38	-3.52	5:01pm

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Welcome Meet Our Group Services

Welcome



As a team specially designated and trained by our firm to work with high net worth families, we skillfully coordinate our client's financial needs and goals in a holistic fashion, and act as your advocate in all wealth matters. Our team operates on the principles of transparency, respect and objectivity. No conflicts. No hidden agendas. By offering institutional quality, non-proprietary asset management and financial planning vehicles, we provide wealth advisory solutions from a perspective very different than some traditional financial advisors..... yours. This combination of personal attention and access to a select group of the firm's most senior and experienced intellectual capital entitles you to a different kind of working relationship with our firm; one that can meaningfully integrate your life and your wealth.

Bulletin Board

- Access your accounts by clicking on Your Portfolio on the right-hand side of this page. While you are there, enroll in E-Delivery and help save some trees!
- See Special Reports for the November On the Markets. November's lineup includes "Let's Get Real" Real yields, which are yields adjusted for inflation, are now very good for high-grade corporate bonds and high yield bonds. In addition, the real earnings yield for the S&P 500 is quite high, too. These attractive real yields give investors an opportunity to get well ahead of inflation argue Chief Investment Officer Jeff Applegate, Chief Investment Strategist David M. Darst and Global Investment Strategist Charles Reinhard in this month's cover story.

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