

News | Indices

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

Enter Symbol

Symbol Name

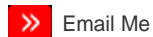
Separate multiple symbols with a space

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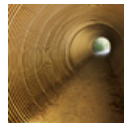
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Welcome Associations Honors Education Services Experience

Welcome



Over the past 20 years I have consulted with clients to help them achieve their goals through an investment process. This process is the same for all investing. Of paramount importance to the process is developing a personal working relationship with each client. Rule number one: Know your client. Rule number two: Stick to the process.

Investment Process

1. State your needs and goals in a written plan.
2. Adopt a sound, time tested asset allocation model that is flexible.
3. Invest with the most capable financial advisors and managers possible.
4. Monitor continuously.
5. Adjust tactically when needed.

This process has been best implemented by tailoring each client's personal plan helping them achieve their goals while utilizing the vast resources and tools of our firm, Morgan Stanley Smith Barney.

Bulletin Board

- You've worked hard to build your retirement assets. Isn't it time they were professionally managed? E-mail me for more information about our Portfolio Management Program.
- We are very appreciative when existing clients refer friends, family, and business associates for an exploratory meeting. We will do our utmost to meet your highest expectations.
- Please contact us to schedule your Quarterly Review.

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