

- > Advisor Homepage
- > Women & Co.
- > Special Reports
- > Educational Articles
- > Key Links
- > Map & Directions
- > Brochures
- > Financial Planning
- > My Branch

- > E-mail Me
- > Account Forms
- > E-mail This Site To A Friend
- > Request Information
- > Request Appointment



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### Welcome



I seek to understand my clients broadly and deeply enough to find the opportunities that add value not only to their financial objectives, but also to their life aspirations. I determine what's really important and develop actionable, flexible strategies to help them meet their financial needs. I also design socially responsible investing portfolios for those who want to truly align their values with their investments, while also helping to deliver the financial returns that they desire.

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