

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

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Welcome



Welcome! My goal is to provide personalized wealth management services with tangible results to select individuals, families, and institutions. I help manage your financial resources within a practice that builds value with exceptional service.

I strive to help you:

- Simplify your life
- Ensure consistent income in retirement
- Transition wealth from one generation to the next and the causes you care about

My goal is to help meet your needs and serve as your principal Financial Advisor. I look forward to being of service to you.

Bulletin Board

- A special thank you at Thanksgiving time to express our sincere appreciation for your continued confidence and loyalty. We wish you and your family a happy and healthy Thanksgiving Day.
- Listen to the replay of the Nov. 17 at 4:00 p.m. ET client call with host Chief Investment Officer Jeff Applegate and his guest Nouriel Roubini, professor of economics at New York University's Stern School of Business and cofounder and chairman of RGE Monitor. Professor Roubini, who is also known as "Dr. Doom" for presciently identifying the credit and housing bubbles, shared his outlook for the global economy and the markets in what was a lively discussion.

AUDIO REPLAY INFORMATION:

The replay will be available from 11/17/2009 to 12/17/2009.

Participant Toll-Free Dial-In Number: (800) 642-1687

Conference ID Number: 40144573

- Ask me about developing, with you, a free Comprehensive Financial Plan based on your financial goals and objectives, and then implementing a disciplined investment strategy designed to help you achieve those goals.

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