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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.

Our processes are geared to those with \$500,000 or more of investable assets.