

News | Indices

<b>Dow</b>	10318.16	<b>-14.28</b>	4:31pm
<b>Nasdaq</b>	2146.04	<b>-10.78</b>	5:30pm
<b>S&amp;P 500</b>	1091.38	<b>-3.52</b>	5:01pm

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### Welcome



At first glance, the thought of developing a comprehensive financial plan might appear overwhelming. With over two decades of experience as a Financial Advisor and CFP® Practitioner, I have discovered that this does not have to be the case. Using a systematic approach, I help my clients organize and simplify their financial affairs. We have discovered that when people follow a plan that is tailored to their unique goals and dreams, they can feel more confident and empowered. This can allow for extra time that can be committed to other areas of interest, things like family, friends, career and spiritual pursuits.

### Bulletin Board

- A change in employers can be an ideal time to decide what you want to do with your accumulated retirement funds. Whether it's rolling over to an IRA or leaving the funds in your former employer's 401(k) plan, we can help you make informed decisions. We know your wealth needs to work hard for you.
- The Global Investment Committee is made up of senior professionals from Morgan Stanley & Co., Morgan Stanley Smith Barney, Citi Investment Research & Analysis and outside financial market experts. The Global Investment Committee provides advice to Morgan Stanley Smith Barney Financial Advisors and our clients through a disciplined process of fundamental research and a comprehensive analysis of economic and market conditions. See Special Reports to meet the members of the Global Investment Committee.
- I am very appreciative when existing clients introduce friends, family, and business associates for an exploratory meeting. I will do my utmost to meet your highest expectations. Please email a link to my website to anyone in your life that may be facing a life changing event, such as retirement or an estate issue.

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### FEATURED REPORTS

Global Investment Committee:  
Capital Markets Overview; 3rd  
Quarter 2009 (pdf)

2009 Quick Reference Sheet (pdf)

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