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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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Email Us

Welcome

Meet Our Group

Services

Welcome



We work with **professionals and retirees** to help them attain the secure lifestyle they need in these times of massive uncertainty. Our clients have entrusted us with a wide range of their financial issues. We hope that gives them the confidence to spend time on the work they enjoy and with the people they love.

In over 25 years in practice, we have developed and refined a multi-step wealth management process. We listen intently and thoroughly to your dreams and fears. We address investment management, wealth transfer and charitable goals. We have assembled a team of experts in an ongoing process of working with a few families where we can have a huge positive impact.

We are happy to have a conversation, sit down with you, and explore the possibility of working together.

Bulletin Board

- 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.

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*Includes years at Smith Barney, affiliates and predecessor firms.

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