

GUIDING PRINCIPLES



Wealth Management for today

MONEY IS NOT TABOO

We all need it, so why is it so awkward to talk about?



Financial wellness starts early and is cultivated in daily life. We need to talk about it openly to educate and empower us all.

NET WORTH ISN'T SELF WORTH

You are more than a number



Know your net worth and your self worth. Both are very important, but one does not guarantee the other.

FINANCIAL LITERACY IS KEY

You made it rain, now it's time to make it grow



You need to get organized and get educated on what you own, how it's titled, what it does, and whether or not it belongs in your portfolio.

DEBT IS NOT FREEDOM

It's not priceless



Avoid high interest debt. You can't be free to save for retirement or invest if you owe your income to someone else. Let's make a plan to pay off that "bad" debt ASAP.

BUDGETS ARE NOT DIETS

Abs are made in the kitchen...

...and financial success is made in budgets. Cash flow management is essential to a good financial plan. Budgets can make a millionaire broke or a poor man rich.



DAY TRADING IS GAMBLING

Don't ask us for a stock pick.



Investing is not gambling. We use a systematic approach to investment management. We build portfolios dependent upon your risk tolerance and your goals. We plan for uncertainty.

DO GOOD BY DOING WELL

Put your money where your mouth is.

We are all stewards of the resources given to us. We need to practice care in management and usage of these resources, whatever they are. Stewardship can be reflected in how you manage your spending, your debt and your investments.



PLANS ARE WORTHLESS, BUT PLANNING IS EVERYTHING

Visualize your future like a pro athlete



Create your compelling future by mapping it out. On paper. Or software. Visualization is used by elite athletes and executives. Trust us, it works. Life, death, divorces, disagreements, the market - nothing is certain. The one thing we know is that your financial strategy will change and we will be there to flex with you.

WE LISTEN MORE

Less advisor talk and more listening.

We could literally have a whole conversation using jargon and acronyms (and movie quotes). But how would that help you? We listen to your concerns and questions to build a strategy tailored for you.



FINANCIAL EDUCATION FOR EVERYONE

From Wall Street to Main Street



The millionaires, the executives, the blue collar workers, students, retirees, all colors, all backgrounds, all ages. We guide you through the planning process that gets you to your goals in the most efficient way.