



Our Clients

Our clients are busy people who care about their futures and those of their families. After years of hard work to save money, they want to make the best decisions about how it should be managed.

One priority is to have enough to take care of themselves without relying on their family. They would like to leave something to their heirs but recognize it's more important to take care of their own needs throughout retirement. Having watched their parents age and deal with medical, memory and long-term care issues, they know they need a well-designed plan and professional guidance to manage their assets.

Our clients want to fully understand their current financial status and make their own decisions with confidence. Knowing what to spend without running out of money, minimizing risk and securing what they've accumulated over the years are all critical. Protecting their assets is often more important than making a lot more.

Typically retired or within a few years of retirement, our clients come from diverse backgrounds — professionals, business owners or employees who have diligently saved through company retirement plans. Some have inherited moderate to large sums of money. Their primary concerns center around maintaining an appropriate level of income during retirement and developing a plan to pass on the remainder of their estate after they're gone.

Now responsible for substantial assets, our clients come to us because they realize the need for an advisor who can clarify complex issues and provide straightforward guidance through transitional life events. They want to know they will be prepared for whatever their future might bring.

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