



## Our Ideal Client Profile

### **Financial Delegators:**

Our ideal client values the advice of a financial advisor and enjoys the freedom and flexibility of having their financial portfolio managed by professionals. With our client's goals, vision and risk tolerance in mind, we are here to manage our client's portfolio and provide insightful and caring guidance.

### **Long Term Partnership:**

Building and managing wealth takes time and patience. Our ideal client prefers to work together over years with their financial advisor to come up with a plan for their long term financial success. Our team is here to serve you with over 37 years of combined financial services experience.

### **Engaged Client Relationships:**

Our ideal client is engaged in portfolio reviews, client events and workshops. We have several social and learning opportunities throughout the year and invite our clients to attend. We also encourage our clients to bring their family and friends that may also be a potential "ideal client."

### **Enjoys Working With A Smaller Firm:**

Our ideal client enjoys working with a smaller firm that can provide more personalized service. While our goal and expectation is for our firm to grow, we never want our clients to feel like a number. Therefore, we will only accept a limited number of clients each year. As we grow we add more technology, team training and resources so that we can always provide a high quality of personalized service.

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