We focus on What's Important to YOU.

Our personalized solutions take into aspect all areas of your life. We can offer guidance, a clarity of your future, and provide expertise in helping you gain confidence in your future.

We will be spending time talking about your goals surrounding your family, health, simplifying your finances, planning your retirement, and many other things that can impact the quality of your life and are a part of your long-term planning.

clarify vision & future	balance work & life	create financial comfort	help & protect family	build a legacy
plan for the future financial planning retirement income estate planning business succession	**meet needs** income planning expense/budgeting social security corporate benefits	**simplify finances** investment & savings home & assets automate aggregate	**help children** allowance & savings loans & gifting special needs learning about money	**execute intentions** wills & trusts power of attorney medical directives protect heirs
ease life's transitions marriage/divorce birth/death leaving my home career & profession	**enhance lifestyle** vacation home family trips & events hobbies & leisure lease v. buy	**reduce taxes** tax-loss harvesting asset location stock options strategies	**assist parents** long-term care eldercare counseling medical & housing	**help beneficiaries** designations special needs trusts & trustees valuation/projections
live my values clarify my mission give to community volunteer my time align investments	**manage health** medicare/supplemental long-term care care concierge wellness & nutrition	**protect assets** insurance liquidity business continuity corporate structure	**fund education** savings & investments pre-paid tuition student/parent loans grants/scholarships	**give to charities** planning strategies tax-advantaged gifts low-basis assets