

Declaration of Independence

Because we are independent, we are free...

- Free to offer our clients the very best financial products available in the market place
- Free, from the restrictions of quotas and products promoted by a Parent Company
- Free to represent a full range of financial companies and to select the most appropriate and suitable financial products available in order to enhance the overall performance of our clients' portfolios
- Free to form our own independent, experienced and talented investment team
- Free to avoid using Wall Street Analysts employed by a Parent Company
- Free to avoid conflicts of interest and proprietary products
- Free to focus on *your* bottom line, not on the "firm's" quarterly earnings
- Free to choose our own cutting edge technology
- Free to think outside the "corporate box"
- Free to participate with the leaders in our industry
- Free to think independently and not follow the corporate herd
- Free to use the most competitive priced products, not the "firm's" preferred product line
- Free to be involved in our community and to help those less fortunate
- Free to build a socially conscious investment firm

...and finally we are all free to work for and with our clients. We completely recognize the only reason we exist is you - Not a parent company's bottom line.