



When I began this career in 1979, my goal was to build a company that would improve the lives of all who it touched. I wanted my clients to be in a better place because of the work we did together.

When they shared their dreams, concerns and fears with us, it created a strong and deep relationship. We hold that bond in high regard. As a result we have many second and third generation clients. Seeing them grow, succeed and pass on a legacy has generated an enormous amount of pride and fulfillment.

As the business grew and took a more sophisticated turn, we began to add prominent experts in related disciplines. Each of these had to share our commitment to excellence and relationship building. The relationship was foremost and transactions secondary.

Through our collaborative efforts, we have established a financial planning firm that enjoys a solid reputation as one of the top in the industry. Putting our clients first, anticipating their needs and providing service beyond what is expected will continue as the forefront in guiding our clients to a better place.

Sincerely,

Robert M. Halligan, ChFC
President