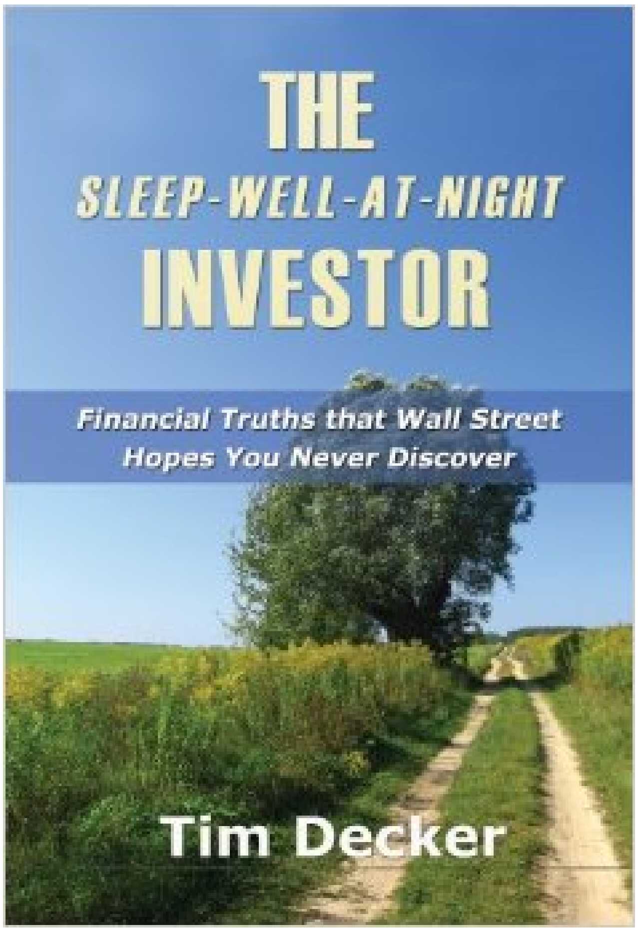
The "Sleep-Well-At-Night" approach to Investment Management

For those with at least $1 million in investment assets, and who qualify after our initial interview selection process, we provide and deliver low-cost, holistic wealth management services. Although we are free to use whatever investment vehicles are most appropriate, we are also extremely fortunate to have access to the institutional fund management company – Dimensional Fund Advisors, whose no-load asset class funds are typically not available to the general public. Additionally, when appropriate, we utilize low-cost, passively managed index funds from Vanguard and others.



Goal Driven and Unique to YOU

The development of an investment portfolio and strategy for our Wealth Management clients is as unique as every individual and family we work with. We approach building a portfolio the same way that we approach building a personalized financial plan – driven by your personal goals and dreams. Additionally, because taxes can be a significant drain on your future wealth, we place a strong emphasis on advanced, tax reduction strategies, as well as working together closely with your tax advisor.

We utilize an academic, evidence-based strategy grounded in financial science and endorsed by Nobel Laureates in finance, not Wall Street's hype and hope.

Account Review and Reporting

Our exclusive, private client portal offers one, easy to access place to review your monthly statements, documents, and information regarding your portfolio and investment accounts.