

Experience has taught us we work best with the following individuals:

- ✓ A desire to have a trusted advisor manage their financial matters
- ✓ A desire to outsource their financial life to focus on other priorities
- ✓ People who view money and investments as a means to reach their goals
- ✓ Their family and other relationships are important to them
- ✓ They are enjoyable to be around and appreciate close, personal relationships
- ✓ They are committed to achieving their goals and value the advice of competent professionals
- ✓ They have annual income of least \$250,000 and/or \$1MM to \$25MM of investable assets

We have specific expertise working with small business owners, dentists, physicians, business professionals and retirees from these professions.