What **We Do** For **Individuals**

Financial Planning

Our advisors take a wholistic approach to the financial lives of clients and help with everything from achieving home-ownership and college funding goals, to creating income-streams and favorable tax-strategies for retirement.

Wealth Management

We leverage industry knowledge and analytical capability to construct customized portfolios that align to our clients' individual financial plans.

Risk Management

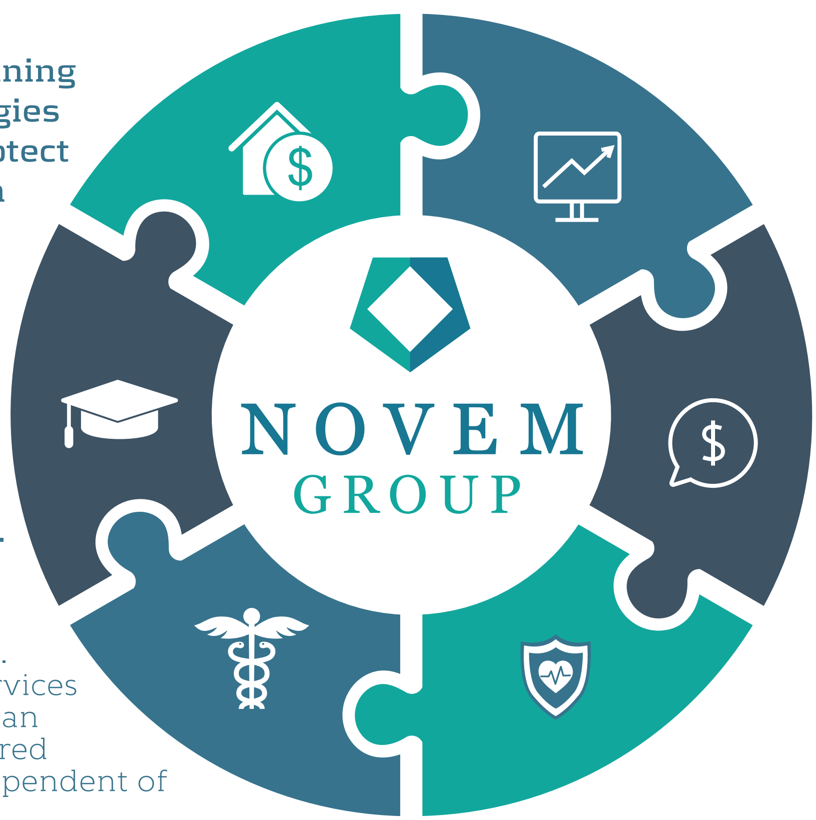
From life and disability insurances to long term care, insurance products are a key method of managing risk in a well balanced financial plan.

College Funding

We assess how to fund, plan, and save for higher education needs.

Estate Planning

We analyze your estate planning needs and implement strategies that help minimize taxes, protect assets, and provide a smooth transition of assets to heirs.



Healthcare Costs

We help you understand your insurance options and manage your costs through the life of your financial plan.

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