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Do you know exactly how much money it is going to take for you to retire comfortably and to remain comfortably retired?

We provide a disciplined and process-driven approach to advising our clients. We focus on helping you clarify your goals and objectives in order to recommend the best strategies for you and your family.

We do this by using various tools such as the **Family Wealth Map**© and the **Wealth Dashboard**©. We review Cash Flow Planning, Risk Management, Investment Strategy, Tax Management, and Estate Planning. We will ensure that you are well-informed in order for you to make decisions that you are comfortable with and understand. We will keep you on track. We will always tell you the unvarnished truth.

The impact of fees can be dramatic over time – minimizing them is essential. As an advisor, it's important to me to have **transparent fees**, giving you the clarity about what you are paying. Our fee-based platform is transparent – all fees are listed in detail right on your statements. They may be **tax-deductible** in the case of non-tax sheltered (Open) investment accounts, and we offer **volume discounts** for larger accounts.

We seek out **low-cost investment solutions** and pass on the savings to you. In a business built on trust, we always put your interests first. We are not tied to any particular set of strategies or financial vehicles, so our advice is not clouded and is always in your best interest. We work with your existing professional advisors and our trusted network of specialists to deliver superior financial advice and services.

Do you want premium, unbiased advice from a dedicated team of professionals who put you first? As a consumer, do you want transparent fees?

If so, let's get started.