

Our Core Beliefs

Your Financial Goals. Our Shared Responsibility.



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1. We believe that the selection of a financial advisor to help guide you through life is one of the most significant decisions a family will make with respect to building long-term wealth.
2. We believe that client interests come first, ahead of the interests of the investment team and firm.
3. We believe that client emotions are often a significant detriment to building wealth.
4. We believe that real wealth is created through ownership vs. loanership.
5. We believe that one good investment can be worth a lifetime of income.
6. We believe that significant focus should be placed on reducing frictional costs on your capital.
7. We believe that investment products are superior when they are simple and understandable.
8. We believe that asset allocation, diversification and automatic monthly investing are important to reducing risk and achieving long-term investment success.
9. We believe that financial leverage (debt) is the enemy of rational investment behavior.
10. We believe that accessibility and responsiveness are necessary for both the investment client and financial advisor to achieve success.
11. We believe that investing side-by-side with our clients leads to greater confidence and stewardship.

“It ain’t what you don’t know that gets you into trouble.

It’s what you know for sure that just ain’t so.”

— Mark Twain