

Investment Advisory Services

Our investment advisory service is built around two client goals: Achieve financial flexibility in the future while providing peace of mind in the present. Below are the cornerstones to how we do it!



If You Can't Explain It Simply, You Don't Understand It Well Enough - A. Einstein

When you remove the "noise," (the decision to invest, and invest in the stock market), is quite simple:

Why Invest: Inflation! If you can't grow your money faster than inflation you may never retire.

Why Invest In The Stock Market: It is the best place to grow your money. The average annual return of the stock market is 10.1%, you will be hard pressed to do better.

Throughout our relationship, we will share many facts just like these ultimately giving you the comfort level in our investment approach that we have obtained over the past two decades.



By Failing To Prepare You Are Preparing To Fail - B. Franklin

To achieve our client's investment goal(s), we use a "give and take" approach:

The Take: We take a fair amount of time to fully understand all your goals, your stock market prowess, your contribution capacity, what's financially most important, etc. Then,

The Give: We give you a clear "roadmap" to meet these goal(s). One that we share immense comfort.

The initial plan will get you on the right track, but life throws us all many curveballs so we will, without a doubt, modify this plan many times during our relationship.



The Whole Is Greater Than The Sum Of It's Parts - Aristotle

Managing all of a client's accounts as ONE portfolio (Holistic) goes a long way in improving performance even before investment selection. Most clearly, this approach:

- 1) Minimizes transaction costs by making one trade versus multiple trades of the same security.
- 2) Maximizes after-tax returns by optimizing tax-deferred accounts as well as taxable accounts, and
- 3) Incorporates "held away" accounts (such as your employer 401k) in order to correctly diversify all assets.

Saving 1 - 2% in expenses annually will go a long way to achieving your goal(s).



Price Is What You Pay. Value Is What You Get - W. Buffett

Combine a quarter century of investment experience and the aforementioned 90+ years of stock market history, our investment approach is proven. At it's core, we exercise the following:

- 1) Long-term holding period: Unless something changes with a company, there is no reason to sell.
- 2) Purposeful diversification: When possible, we stick to 40 - 50 holdings. This may increase volatility but results in greater long-term performance, and
- 3) Fundamental investment philosophy: Well-tested approach that focuses on buying value-creating companies (at a discount) we can confidently say will continue to succeed into the foreseeable future.

After nearly two decades of providing investment advisory services it is clear our client's goal(s) will only be achieved with the right investor behavior.... patience and discipline. Our approach has been proven to get you there.

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