The Partnership Approach

My goal is to help you achieve financial security and peace of mind.

Keys to a Successful Relationship: What You Can Expect

I will earn your trust and respect by ensuring:

- Our relationship is based on integrity and ethics.
- I remain knowledgeable and committed to lifelong learning.
- I am responsive, effective, and accountable.
- I act with your best interests in mind.
- I present information to you in an easy-to-understand manner.
- I explain the implications of the strategies the solutions I present.
- I communicate with you regularly in the way you best prefer.
- I meet with you to review your financial goals and results.

Keys to a Successful Relationship: What I Can Expect

Effective communication and mutual respect are essential to a successful partnership, so I will welcome your:

- Trust and respect
- Commitment to the process and complete disclosure
- Honesty and sincerity

It is important you understand any recommended financial planning strategies are always based on your best interests. As my client, all investment, tax, estate and insurance advice will be based on the information you provide. I look forward to you fully participating with me in the financial planning process.

Keys to a Successful Relationship: Mutual Responsibilities

Working together is essential to effective financial planning. To this end, we both need to make your financial strategies a priority. We will agree to:

- keep each other informed of any new developments that might affect these strategies
- be honest and forth coming about your financial situation
- develop and maintain mutual trust, respect, and understanding over the long term