Financial Planning





The investment goals and objectives we develop together must be designed to meet your needs - even as your life takes unexpected turns. We monitor and review investment policies with you on a regular basis to ensure your strategy stays aligned with your life.

Custom Account Management

- Asset allocation
- · Liquidity needs analysis
- Retirement planning
- Philanthropic planning
- · Risk management
- Socially responsible investment solutions
- Shareholder engagement

When requested, we work with clients to define impact priorities, and we conduct our own independent research and due diligence to source unique public and private investment opportunities. We focus our attention on impact investments that will provide sustainable financial and social returns over time.

Trust Management Services

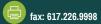
As a full-service wealth management firm, we ensure that your trust account is managed to achieve your financial vision and extend your personal values to future generations.

- Experienced trustees
- · Estate planning review capabilities
- Thoughtful trust administration
- · Family office advisory services

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Financial Planning





OUR FOCUS STAYS ON YOU

Our team brings a wealth of experience, but client input on goals, needs, values and priorities guides our work. We rely on meaningful one-on-one conversations to build tailored plans that serve each client based on his or her unique aspirations and preferences.

We develop a strategy that works for you, with you, and stays in line with the values you live by and the legacy you want to leave behind.

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