

ARRIVING AT THE RIGHT
SOLUTION BEGINS BY
ASKING THE RIGHT
QUESTIONS.

Investment Policy Statement

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

Innovative Impact Investment Research and Opportunities

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



MARRIAGE

You're joining forces, joining dreams, joining expenses. What's your shared vision?



HOME

You're making what could be the largest purchase of your lifetime. Is it the smart move?



CHILDREN

You know that it's not just about you anymore. How will you pursue your dreams and ensure their security?



COLLEGE

Your children's tuition costs continue to outpace inflation. Planning ahead gives you financial flexibility and your future graduate more options to consider.



INHERITANCE

Loss of a loved one may also bring inherited wealth. How do these assets fit in with your long-term plan?



PHILANTHROPY

How should you distribute assets to the causes you care most about?



RETIREMENT

You're ready to retire. When, how, and what does life after your career look like?



LONG-TERM CARE PLANNING

Our average lifespan is lengthening. Are you prepared for the health care you and your family will need?



LEGACY

What mark will you leave behind?

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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