

I am an Independent Advisor...

I have one business...trying to help people reach their most critical financial and life goals. I don't invent, package, or use strange financial products.

My sole measure of success is the success of my clients...never some commission number or fancy title bestowed for top "sales" performance

And with the possible exception of a lucky lottery ticket, no one on my staff is likely to be getting any million dollar bonus checks.

Also, since the name on the door is probably mine, it won't be changing anytime soon.

I never say, do, or recommend anything to my clients in order to meet some production quota, win some stupid contest, or keep my job.

No boss ever stands at my desk and suggests that I pitch my clients some stock "the firm really likes" or some bond "we have in inventory."

I do my own homework and make judgments based on my professional experience and wisdom...which I have worked pretty hard to develop over many years.

I have a team of experts' on-call, ready to help anytime I need them. But for my clients, I am the go-to person.

I love what I do and am deeply passionate about helping my clients succeed. This will never be just a job for me. It's a professional calling and I live it every day.

In many ways when you hire me it's like hiring a Master Captain for your ship. It's *your* ship...so you can come up to the bridge anytime, but don't touch anything! It's my job to try to get you safely through the storms and into port.

I know that the market and the economy can be fickle but your goals are not. So I try to plan for any eventuality and try to think a few steps ahead of the crowd.

But I'm also a human being so I don't always get it right or make perfect decisions. If there is a problem, I step up to the plate and work hard to fix it.

I believe that trust and respect can only be earned over time. Our relationship will grow at its own natural pace. There is never a rush or time pressure.

I always strive to anticipate your needs, but I'm not Karnak the Mind-Reader. Open communications is critical so if anything is on your mind...just tell me.

I am an independent advisor. I am here ...first, last, and always...for YOU!
