Our clients are busy, successful people who want to simplify their lives without sacrificing their goals.

They recognize the value of their time, and of our expertise. They prefer to spend their limited free time enjoying life and focusing on their families and careers rather than trying to stay on top of the litany of complex issues facing those with substantial wealth.

For this reason, they seek long-term relationships with us as their trusted advisor. They appreciate our knowledge, experience and expertise, but it is the personal attention and obvious concern for their personal well being and future success that they come to value most.

Our clients are typically successful individuals who have accumulated significant assets. Most are retired or preparing seriously for retirement. They are typically conservative to moderate investors more concerned with prudently preserving and protecting their assets and achieving their goals than beating the market or finding the next hot stock. Most of our clients are referred to us by other clients, friends, or another trusted advisor, attorney, or accountant.