

Our Clients

Alex B. Shore, CFP®

Managing Principal

Senior Fundamental Choice Portfolio Manager

Our clients are busy people, involved in their businesses, raising their families, active in their churches and causes they care about, engaged in various sports, hobbies and other interests.

Most of them have earned their wealth. They are concerned about preserving and growing it safely into and throughout their retirement. They want an advisor who can help them develop an investment plan that actively seeks to protect their capital and gives them confidence that their long-term needs will be covered.

Some know they need help to avoid the mistakes they've made over the last decade. They thought they were doing the right thing—trying to match high performance numbers or simply holding on through market ups and downs. They may have let their emotions or hot ideas from the latest guru get in the way of making good decisions. Now they are ready to turn over the day-to-day management of their investments to someone they trust, who combines an analytical, academic approach with years of practical experience, rather than try to guess where things are going.

As they approach retirement, most clients are concerned about creating a dependable and sustainable income stream that provides sufficient cash flow to meet their retirement living needs as well as a cushion from market volatility.

Finally, most of our clients have a strong sense of stewardship and a sincere desire to do the best they can with the resources they have been given. They want the help of an advisor who understands their perspective and motivation, and can guide them in making good decisions to provide for themselves and their families as well as for people and organizations they care about.

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