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Building a Relationship

Our Mission: We provide tailored investment advice so our clients can live their lives. Our clients have unique, important and ever changing financial goals that we strive to meet through asset allocation, rigorous investment planning and frequent client contact. Our success derives from doing what is in the best interest of our clients – period.

Our clients expect that we will

- treat them with respect, honesty and dignity
- act as their advisor, putting their interests first
- strive to acquire a complete understanding of their goals, tolerance for investment risk and their investment time frame
- explain the implications of the strategies and costs we propose
- update them by email, mail and phone

We expect from our clients: respect, honesty, complete disclosure, and commitment.

The New Client Process: While we cannot be all things to all people, we strive to be all things to an exclusive group known as our clients. We have chosen to limit our practice to a maximum of 300 families. Limiting our relationships allows us to provide unparalleled service that in turn promotes a quality referral based practice. As a result we follow a disciplined process that strives to ensure that we are a good fit for one another:

- Our first appointment is a "fit" appointment for you to learn as much as possible about our practice and for us to evaluate our ability to help you. We will consider your assets, our chemistry, and whether we believe we can provide what you're looking for. In turn, we want you to evaluate our chemistry, our investment philosophy and your desire to trust us to begin a long-term relationship.
- After our first appointment we will wait at least two days to allow both parties to decide whether to move forward in establishing a long-term client relationship.
- The typical next (second) appointment is for us to learn everything we can about your life circumstances and financial goals so we can begin constructing our initial Envision® Plan.
- At our next meeting we will present the results of our planning, make our initial investment recommendations and establish the various accounts you require.

While our process may seem long and, in some ways too structured, we believe ensuring a good "fit" before becoming a client benefits all parties and that the process above best enables us to provide what our clients want and need in a financial advisory relationship.