YOUR LOGO HERE

YOUR FIRM NAME HERE
AT A GLANCE

FOUNDED

1982

SERVING

INDIVIDUAL INVESTORS

RETIREMENT PLANS

INSTITUTIONS

LEADERSHIP

JANE SMITH, CFP®, MBA

JOHN DOE, CFP®, CPA/PFS, MBA

STAFF

12

DAVID DAVIS

THOMAS THOMAS

LOCATIONS

2

NEW YORK, NY

ALBANY, NY

ASSETS UNDER MGMT

$75 MILLION

AS OF SEPTEMBER 30, 2020

SPECIALTIES

PRE-RETIREES

SOFTWARE ENGINEERS

MILITARY

BUSINESS OWNERS

LGBTQ

MISSION

We help our clients identify and achieve their greatest personal goals by offering informed, objective, and far-reaching financial advice, tailored to each individual's unique circumstances. We also value and celebrate a corporate culture strengthened by thoughtful collaboration, diverse perspectives, and mutual respect among our colleagues, strategic allies, and client relationships.

SERVICES

WEALTH MANAGEMENT

FINANCIAL PLANNING

INVESTMENT MANAGEMENT

SUSTAINABLE INVESTING

TAX PLANNING

RETIREMENT PLANNING

LEGACY PLANNING

CHARITABLE GIVING

COLLEGE PLANNING

401(K) PLANS

KEY QUALITIES

WE ARE:

An independent, fee-only, fiduciary Registered Investment Advisor firm

We are your dedicated financial advocate and advisor across our ENTIRE relationship.

YOUR CLIENT EXPERIENCE IS:

High-touch, far-reaching, and deeply personalized

Through planning, process, and joyful collaboration, we've got you covered – from your greatest wealth interests to every granular detail.

YOUR INVESTMENTS ARE:

Low-cost, globally diversified, evidence-based

Apply the timeless tenets of sensible investing to invest toward your personal financial goals.

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KEY ALLIANCES

FUND MANAGERS

Our select fund manager alliances help us consistently apply your ideal investment strategy.

LISTED HERE

YOUR MONEY IS HELD AT

Your assets are held independently, with transparent transaction reports sent directly to you.

LISTED HERE

ALSO AFFILIATED WITH

Additional professional affiliations ensure we gain from, and contribute to best financial advisory practices: advancing transparent, low-cost, strictly fiduciary levels of client care.

LISTED HERE

We are a proud, independent member of:

Buckingham STRATEGIC PARTNERS

Our strategic partnership with Buckingham Strategic Partners, a nationwide community of fiduciary, independent advisors, brings you the best of both worlds: Our personalized advice and meticulous client care, strengthened by world-class financial services and expertise.

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