



Investment Management Process



Risk Assessment

Everyone's goals and comfort level is different when it comes to investing. Whether your goal is around the corner or many years down the road, we ask a lot questions to best understand what is important to you, without the complicated financial jargon.



Ongoing Due Diligence

Every quarter, our Investment Committee reviews all investments we use in all client accounts. Our proprietary review process ensures we are using the best investment options available. During our review meetings, we will identify any changes in your goals or situation and make adjustments to your investment strategy.



Income Generation

When our clients rely on their investments for current income, we review the following every year:

How much income did you take relative to your overall assets?

Do you have any major expenses in the next 12 to 24 months we need to plan for?

This allows us to be proactive with your changing needs.

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