

Frequently Asked Questions



How are you different?

We are fiduciaries, we have a proprietary client service plan that has been developed for over 20 years, and we will call you back the same day. We provide financial advice in all aspects of life. You can lean on us.

Our business is built on generational relationships, we are also a multi-generational team! We treat you the same way we would treat family.

What is a fiduciary?

As a fiduciary, by law, your interests must come first. This differs from most financial advisors who only have to prove what they do is suitable for you.



How are you compensated?

Our fees are 100% transparent. You pay us a % of the assets under management. That way our interests are aligned and we are sitting on the same side of the desk.

Who is your typical client?

Someone who is open, honest, willing to participate in our financial planning process, and is comfortable with discretionary investment management. Looking to develop and close relationship with our team.

What is your investment strategy?

Ultimately how we structure your portfolio depends on your risk tolerance and objectives. We have a strong focus on dividend-paying companies that look to grow their dividends. We buy solid, dependable companies that will pay us to hold them long-term.

