Wealth by Design

Independent & focused on you!

A boutique wealth services firm, we work with individuals and families that value a holistic financial approach to the fall season of life. It is an honor and privilege to provide clarity to the financial and life choices you have and creatively support you in living a life without regrets. We are committed to delivering more than investment advice and you will profit from our guidance on an increasingly complex financial journey.

Optimizing
Financial Possibilities

Unfolding Life Potential

YOU WILL BE HEARD. We listen to your hopes, aspirations, concerns, and challenges. We provide discovery tools to help us fully appreciate your unique life transitions and elements of financial satisfaction. You will feel supported in visualizing and clarifying your values and discerning financial direction heading toward your fall season of life. Through our comprehensive process of discovery, you will benefit from knowing we understand what is important to you and your family.

YOU WILL BE INVOLVED. Money is not an end in itself, but a means to help you create and sustain your version of prosperity. You will create a picture of what you want your life to look like, both now and down the road. You will lay out the financial assets and liabilities you have accrued, and we will work together to refine or define the financial tools that will support you in putting the puzzle of retirement together. We address your lifestyle needs, liquidity desires, longevity concerns and legacy wishes with both a qualitative and quantitative outlook.

YOU WILL BE EMPOWERED. Education is a foundational component in walking alongside our clients. You will understand what your options are, with potential opportunities and consequences of decisions made. As tax, legislation, and economic environments change, we will keep you apprised of what it means to you and your financial situation. As you move forward in unfolding what "rewirement" holds for you, we want to see you maximize your return on life!

YOU WILL UNDERSTAND. You will have a clear picture of our scope of services, what your time commitment will be and what the financial costs entail. We will help you discern direction as your life and financial environments shift from the "accumulation" phase of life and move towards and into the "distribution" season. Whether you are looking at a strategic financial plan, or want to have your assets managed by our team of experts, we adhere to the fiduciary standard – Your interests come before our own.

YOU WILL BE ACCOUNTABLE. Your life is constantly in motion and there will always be financial elements that need to be addressed. We are your advocates in creating and sustaining a healthy financial life. We will help you define timelines and action steps to keep you on a positive trajectory in managing life circumstances and economic environments.

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