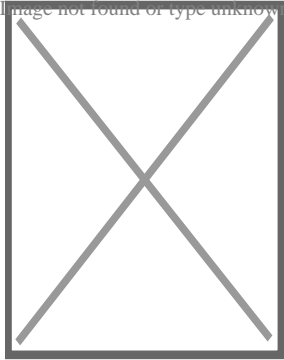


Process



My priority is developing and maintaining your financial security. I accomplish this through sound investment guidance, consistent customer service, and dedication to my process which includes the following:

- Developing a comprehensive analysis of your personal and financial situation through ongoing discussions of your goals, risk tolerance, and time horizon.
- Creating a personalized plan together to address any issues or opportunities you may have and determining which investment strategy is the most suitable for you.
- Implementing your plan and investment strategy.
- Reviewing your plan and making adjustments as you see fit. We cater to our clients' needs and will provide periodic reviews of both your investments and current market conditions.
- Coordinating with other professional advisors including your CPA and attorney, as needed.