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First Vice President, Wealth Management, Financial Advisor, CERTIFIED FINANCIAL PLANNER®, Insurance Planning Director, Financial Planning Specialist, Workplace Advisor – Equity Compensation, Alternative Investments Director

What Can You Expect From Me

As your financial advisor, I am dedicated to providing a personalized, compassionate, and thorough approach to managing your financial future. Here's what you can count on:

Transparency & Honesty

- **Straightforward Communication:** I always tell it like it is, and I expect the same from you. Open and honest communication is the foundation of our relationship.
- **Clear Understanding:** You will always know what we're doing and why until you are fully confident in my recommendations.
- **Family-Like Care:** I take the time to get to know you and your family thoroughly, treating you with the same care and respect as my own family.

Risk Management & Comprehensive Planning

- **Holistic Approach:** I virtually cover all aspects of your financial life, managing both sides of your balance sheet with precision.
- **Tax Strategies:** My recommendations are always made with tax awareness, helping you keep more of what you earn.
- **Professional Focus & Due Diligence:** I conduct thorough research on managers that fit your needs.
- **Personalized Strategies:** I facilitate access to wealth managers for one-on-one calls and updates, and ensure their strategies are tailored to your portfolio.

Collaboration

- **Your Voice Matters:** I work collaboratively with you, ensuring your ideas are heard and implemented when appropriate.
- **Responsive & Available:** Timeliness is crucial to me. I aim to address your needs as soon as possible, helping provide confidence that everything is taken care of.
- **Follow-Up & Persistence:** I keep you accountable for implementing your plan and any necessary actions to help accomplish your goals, ensuring you stay on track.

My collaborative process has helped clients reach their financial goals. With my advice and planning, you can rest assured knowing that your financial future is in good hands.

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