Mission

Striving to positively effect and improve the quality of life of all those interacted with, especially clients who I commit to educating customizing, and monitoring their financial situation; bringing them clarity and confidence to all their financial decisions. My goal is to create long term relationships to help guide valued clients in harvesting their financial success.

Values

>Treat each client as if they are the one, most important client.
>Respect each concern, worry, question, challenge that a client has as the most important item of the moment.
>Treat each client's portfolio and protection program as a unique, individual priority.
>Looking out for the welfare of my client before my own interests.
>Doing my very best to understand each client, their values, goals, level of risk, and personal beliefs to better serve their interests.

Behavior

>Listen to the concerns, dreams, fears, and goals of each client.
>Ask question and listen to responses to more fully understand client's situation.
>Seek and recommend the best solutions to provide the best opportunity for client's increased quality of life and ability to be independent and secure in all they do.
>Seek out answers to challenges in areas where I might be less knowledgeable.