



Our Ideal Client

The Client we serve the best has the following qualities:

- **THEY ARE FINANCIAL DELEGATORS:** Our community of clients appreciate, and are happy to follow, the advice of a team of financial experts coordinated by a single Trusted Advisor.
- **THEY ARE PASSIONATE ABOUT GOALS:** Our clients realize that achieving their goals requires both money and planning. Our community of Ideal Clients appreciates our commitment to pay close attention to all the financial details and proactively recommend the inevitable course corrections, as required, several times each year.
- **THEY ENJOY SIMPLICITY:** Our clients enjoy the simplicity, freedom, and peace of mind that comes from having all of their financial assets under the watchful eye of a single, Trusted Advisor who provides oversight, coordinating all personal financial affairs.
- **THEY VALUE OUR WORK TOGETHER:** Our clients appreciate advice and guidance. Due to the high level of client interaction and attention, our services make sense for families who have accumulated more \$5,000,000, not including the value of their home
- **THEY FOCUS ON WHAT'S IMPORTANT:** Our clients delegate financial matters so they can focus their valuable time and energy on the things in their life that are most important to them. Clients who appreciate an advisor who views their role as to protect financial assets, and the financial strategy, allowing clients to focus upon the things which matter most in life.
- **THEY APPRECIATE THE CANDID TRUTH:** Our clients want to hear the truth from us regarding their financial situation...no matter what. Clients who rely upon complete transparency from their advisor.

Once we have a community of one hundred clients who meet this profile we will not be accepting any new clients.