DAVENPORT 1863
BUILDING WEALTH TOGETHER

Phone:

Our Process

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Each new client interaction begins with active listening which leads to a prioritization of your needs. Once we have identified your financial and life goals, we will develop an investment plan that considers your risk tolerance and time horizon.

We encourage our clients to be involved in an annual review of their financial and life goals. We will monitor your investment plan and meet with you several times annually to discuss investment weighting and other necessary adjustments due to changes in the market and your personal financial goals.