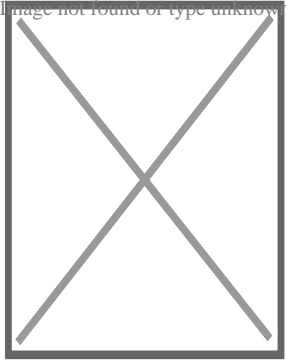


Investment Process



Our priority is helping to develop and maintain your financial security. We work to accomplish this through sound investment guidance, consistent customer service, and dedication to our 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.