



## VISION

### Core Values

1. We will always conduct ourselves in such a way to bring honor to our firm and all those that we are associated.
2. We will always make recommendations that we believe are in our client's best interest!
3. If we make a mistake, we will acknowledge it and then work diligently to correct it as soon as possible.
4. We are passionate about helping others!
5. We are passionate about seeking opportunities to learn something new that helps us help our clients!

### Core Beliefs

- We believe the truest road to success lies in helping others succeed.
- We believe that being independent allows us to provide a better level of service to our clients.
- We believe that a well thought out financial plan is the master strategy and all key financial decisions should stem from the plan.
- We believe it's important to focus our effort on finding and maintaining Win/Win relationships - Defined as relationships that are profitable, with people who we enjoy working with, that appreciate what we do for them, and where we believe we can have a positive and meaningful impact.
- We believe that risk and return are always related and that you never get higher return without taking a higher risk.
- We believe it is almost always wiser to forego the opportunity to make a killing for the eternal blessing of never getting killed!
- We believe it's important that we manage our own personal financial situation in a similar manner as we advise our clients!
- We believe that our primary role is to help our clients become good stewards of their net worth.