

## **Helping clients navigate through challenging times**

Along with challenges, the market also brings new opportunities – you just have to know where to look and when to take action. Over the years, I've helped clients navigate through challenging times with purpose and confidence toward their financial goals, and I'm here to help you, too.

Backed by the strength and resources of Raymond James – one of the country's leading independent financial firms – I can offer you an array of personalized financial services, support and guidance that can help make a positive difference in the pursuit of your unique financial goals.

## **Personalized planning for your financial goals, aspirations and investment needs**

Your financial goals, aspirations and investment needs are just that – yours. And your financial plan should reflect that. So rather than ask you to settle for an off-the-shelf investment program, our team is here to provide you with personalized financial planning based on your goals, your time frame and your particular tolerance for risk.

We can provide you with just the right combination of financial services, support and guidance that makes the most sense for you. And should something change, we'll also be there to help keep you on track in the pursuit of your personal financial goals.

## **Preserving capital and managing risk**

Preserving capital and managing risk are two important objectives for investors, and in today's global economy, they can be more challenging than ever. Over the years, we've had the privilege of helping clients manage the complexities of their wealth through carefully constructed portfolios and a strategic combination of traditional investment solutions and more sophisticated investment alternatives.

Backed by the strength and resources of Raymond James, our advisors can offer you an array of personalized investment services, support and guidance that can help make a positive difference as you pursue your financial goals.

## **Experienced investment manager to simplify complexities of your wealth**

When you're backed by experienced investment managers able to simplify the complexities of your wealth, you'll find that it can also help simplify your life. Through a disciplined process and investment choices based on your goals, time frame and risk tolerance, we can help not only reduce the many questions that can come with investing, but can also help you identify many opportunities as well – all in an effort to help make your life easier.

Our team can provide you with investment services and guidance that make the most sense for you and your family. We'll also be there to help you each step of the way as you pursue your personal financial goals.

### **CFP: Held to the highest standards to assist in pursuit of financial goals**

When planning your financial future, many details regarding your money and your life's goals must be addressed. With so much at stake, why not look to a CERTIFIED FINANCIAL PLANNER™ professional who is held to the highest ethical and professional standards in the industry? One who you can be confident has the education and experience to assist you with your complex financial needs and offer you sound, unbiased advice as you best plan for the future?

When working with me, you and your needs are the focus of the financial planning relationship; they are what drive my recommendations for managing your wealth. And as a CFP® professional, I am committed to providing personalized, objective advice as you pursue your financial goals.

### **Comprehensive wealth management for today and future generations**

Managing wealth with an eye toward the future demands vigilance and skill in today's global economy. Over the years, I've worked with clients and their other professional advisors – including attorneys and accountants – to create comprehensive wealth management plans designed to make the best use of their wealth today, and to help ensure its endurance for future generations. I'll do the same for you.

I can offer you an array of personalized services, support and guidance that can help make a positive difference in the pursuit of your financial goals.