Some individual investors enjoy maintaining self-directed accounts in which to conduct securities transactions. They may have the time and interest to manage assets, but yet they may want to consult a professional to enhance the techniques used in managing their money.

If you want to continue to self-manage your assets but would like guidance from a pro to help keep you disciplined and efficient, then our Advisory and Consulting Service may be right for you. An initial consultation to review your needs will be completed and then recommendations on how to implement a strategy will be provided. Initiating an Advisory relationship may be best done by engaging us to first complete a comprehensive Financial Plan. Information uncovered in that process will allow us to then offer you step by step instructions that will help the implementation to be straightforward. The frequency of the ongoing service is dictated by you for your specific needs.

For costs please see our Fee Schedule .