

Our recommendations are based on you, and your life, and your individual needs. Before I make a recommendation, the first thing I want to do is focus on what your goals are. I take the time to discuss your risk tolerance and other important factors concerning your financial situation. We work together to build a plan. Those recommendations will be tailored around what your needs are. Then I suggest options that you may want to consider based on that. I am always happy to explain the rationale behind it and why I think that particular option might be right for you.