Our Ideal Client

We want to thank you for being a part of our practice and more importantly a part of our lives. After years of serving our clients we have learned many things and several things have become clear.

Perhaps our most important revelation over the years and through our experiences is that we cannot be all things to all people and deliver the level of service and commitment that individuals like you, our Ideal Clients, deserve. In addition to having developed and refined our proprietary process, the True Legacy FORMula, we have become aware of the clients we are best suited to partner with and serve.

As your Financial Advisor, we believe that your goal of achieving financial independence must be at the core of our philosophy and planning strategy. The relationships we are most philosophically aligned with are not defined by money or investments, but rather attitudinal qualities of people most like ourselves.

Our Ideal Clients:

- Value relationships based upon mutual trust in and service to one another
- Respect others' feelings, and are compassionate in what they do and desire
- Have confidence in delegating their wealth management needs to a professional
- Are friendly, nice people who appreciate our staff and our expertise
- Approach life with joy and optimism
- Choose to be intentional in their preparation for a confident financial future
- Are enlightened about their own paths to financial independence, listening and remaining open to ideas and experience
- Maintain a sense of purpose in their lives
- Have gratitude for today and ambition for tomorrow

True Legacy
Financial
& Insurance Services