

Independence: As an independent firm, we can find the best products and services for our clients. There is no affiliation with any brokerage firm, insurance company or bank.

Fee-Only: We do not receive any commissions or other fees from vendors, so there is no incentive to sell you unnecessary or higher cost products.

Resources: As a member of the Garrett Planning Network, we have access to the knowledge and experience of over 300 like-minded financial advisors and industry professionals.