

Client Profile

We provide the greatest value-added to clients with the following characteristics:

Family

- *Cares about and loves his/her family – Strong values*
- *High integrity and is family centered*
- *Friendly, helpful, open-minded, and influential*

Business

- *Owns an established, highly successful business*
- *Cares about business perpetuation and/or maximization of wealth*
- *Well respected by employees.*

Community

- *Has a concern and vision for local community.*
- *Well respected by his/her peers, friends, and family.*

Planning

- *Respects long-term relationships and counts on advisors*
- *Has a vision of the future for his/ her business, personal, and community life*
- *Is willing to take time to plan and is honest about feelings and concern.*