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We guide our clients towards their financial  
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Your goals and priorities are yours alone. Our financial planning process creates a blueprint to support your long-term financial independence.



### Portfolio Strategies

Your unique needs call for individualized investment expertise. Because our team of portfolio specialists is in-house, the decisions we make reflect your financial plan.



### Client Services

Service. It's not just a word. It's everything we do. To us, exceptional service and relationships aren't words but are the foundation of how we work.

### Your Financial House®

How do you become financially successful? It's not chance. It's knowing the right questions to ask yourself and your financial advisor. Your Financial House® helps you create a custom financial plan centered around your dreams and goals. And we believe that should be at the heart of any long-term investment strategy.

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5825 Feldspar Way, Birmingham, Alabama 35244 | Phone: (205) 989-3498 | Toll Free:  
(888) 989-3498

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