Hi, I'm Casey Frye.

And I'm Jerod Wurm.

We want to take a few moments today and give you a quick introduction to our company.

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If you're not familiar with us, we'd like to briefly share both our approach to investing and our commitment to client care.

As certified financial planner professionals, Jerod and I are fiercely proud of our role as independent advisors.

Casey and I met well over 20 years ago as rookies at a national planning firm. Not only did we form the basis of our business friendship there, but back then we also learned the importance of having a wealth management approach that is rooted in investment planning.

Over the years, we've seen firsthand the successes our clients have achieved by having a written and well thought out game plan for achieving their goals. So as a result, our aim is to provide each of our clients with their own personalized road map. The map is the cornerstone of every client review. We refer to it often and we update it proactively.

When it comes to investing, we are committed to managing diversified portfolios grounded in modern portfolio theory and asset allocation.

Yeah. To simply put, it's the science behind not having all of your eggs in one basket.

We target returns that are tied back to the written game plan. This helps us target the returns you need while helping to avoid unnecessary risks. We rebalance portfolios strategically, which also helps to keep market risk in check.

We lean towards index investing, which can help keep investment costs lower than traditional mutual funds. This approach can help keep costs lower for our clients without compromising diversification or total return.

As independent advisors, we're not beholding to a specific product or a company, and we definitely do not take soft money kickbacks to lean towards one solution over another. We use an open architecture approach to investing, which allows us to survey the universe of investment solutions in order to provide the most sensible approach.

As it relates to our compensation, we determine more than 20 years ago to shy away from the commission based solutions. We are proud to be a fee based practice from the very beginning we took steps to address potential conflicts of interest by aligning our compensation with the client's goals rather than the number of transactions or trades made in their account.

Yes, by aligning our goals, we're able to keep it simple. Generally speaking, the more you make, the more we make. And the opposite is also true. Portfolio losses can be punitive to us.

Our fee based approach helps to maintain easily identifiable pricing for our clientele and clearly addresses the problem of hidden commissions.

One complaint we've heard over and over from prospective clients is this, "I never hear from my advisors." And the truth is most advisors have far too many clients, which can result in levels of client neglect.

One of the reasons we have maintained a boutique approach is to help ensure that our clients never feel neglected. We connect with our clients often, and we meet with them proactively. Our clients know they're not just a number, merely one of 1,000. Instead, our clients know they're part of our family.

We're committed to delivering timely and trustworthy advice.

With exceptional client service.

If you're intrigued by our approach and you'd like to learn more, you should really consider taking advantage of our second opinion services.

Our second opinion services are an opportunity for you to get additional, experience perspectives regarding your portfolio's actual total costs, including potential hidden fees, to evaluate your portfolio's actual downside risk, and to evaluate your portfolio's investment overlap, or its true diversification.

All of our contact information will be available at the conclusion of today's video, and you can learn more about our complimentary second opinion services by visiting our page.

I truly have the best job in the world. We get to lock arms with some of the most wonderful people on planet Earth, and we celebrate their successes along the way. We would welcome the opportunity to discuss your specific situation further, and to unpack all of the ways that we can help with trustworthy advice and exceptional service. Thank you for watching. Until next time.

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