



FIRESIDE
FINANCIAL

FOUNDATIONS

OUR VISION

To make a difference in the lives of our clients by being their leading financial resource.

OUR MISSION

To listen, establish and help our clients accomplish their most important financial goals.

CORE VALUES

- » Listen to what is most important to our clients.
- » Be present.
- » What can we do to help?
- » People before profits.
- » Leave something better than how you found it.
- » Simplify the complex so that our clients can make more informed decisions.
- » Always seek to acquire more knowledge through experience rather than just education.
- » Learn with the intent to teach.
- » We acknowledge not having all the answers, but we are always willing to find them.
- » Always consider constructive criticism and advice.
- » We learn more from failure than we do success.
- » Every defeat offers a seed of an equivalent advantage. Look for the seed.
- » Compensate on value over titles.
- » Provide more value than what our clients pay for our advice and service.

STRATEGIES

By focusing on qualified relationships, we are better able to use our experience, knowledge and access to a network of financial professionals to directly make a difference in the financial lives of our clients.

We design strategies for high net-worth and highly compensated individuals who pay too much in taxes.

VALUE STATEMENT

Success is defined as being the leading financial resource for our clients. We strive to always be lifetime learners and utilize this knowledge to simplify the vast and complex world of finance for our clients. We listen to what matters most to our clients and partner with other financial professionals to help lead our clients in establishing and accomplishing their most important financial goals. We will always look to exceed in value what our clients pay for our advice and service.

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