Contact Information

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Professional Services	Comprehensive Financial Planning Investment Advice & Management Wealth Management & Transfer Financial Coaching Values & Goals Exploration Goal Prioritization
Practice Approach	Fee-Only Wealth Management, Financial Planning & Investment Management
Client Focus	Individuals, Couples & Families Facing Transitions (Widows, Divorcees, Retirees, etc.)
Typical Client Profile	Age: 45-65 Gender: N/A Income: N/A Net Worth: $2,000,000 +
Licenses/Certifications/ Designations	Chartered Retirement Planning Counselor Accredited Asset Management Specialist Accredited Wealth Management Advisor Certified Wealthcare Analyst
Education	B.A., Furman University
Fee Structure	Fee-Only Retainer
Years in Practice	18
Professional Association Affiliations	Financial Therapy Association
Research Interests	Financial Therapy & Behavior

Personal Statement

I left a Wall Street brokerage firm after 12 years because I was frustrated with the ego and hype that abounded most of the financial services industry. To me, traditional financial advice is broken as advisors focus more on playing the market than actually meeting client's needs.

In 2009, I joined Wealthcare Capital Management® (WCM). WCM provides additional support and resources that I can utilize to best serve my clients.

Bottom line: I wanted to do things differently.

It's time for a "revolution" in financial planning, financial advice and wealth management. I'm someone who knows about simple, sustainable wealth management strategies, and who wants to share that knowledge with friendly people who want to take care of themselves and their families.

Most of my new clients come to me via referral from existing clients, and I think that says more about me and what I do than most else.