

Comprehensive planning, fiduciary care.

Objective, personalized guidance from a fee-only, fiduciary registered investment adviser — serving individuals and families across Connecticut, Massachusetts, and New York.



A true fiduciary standard

As a registered investment adviser, we are obligated to act in your best interest. We never earn commissions or referral fees.



Transparent, fee-only pricing

Asset-based advisory fees and flat-fee planning engagements, disclosed clearly in our Form ADV and Client Relationship Summary.



Credentialed professionals

Our team includes CFP® professionals, CPAs, and CFAs with decades of combined experience across market cycles.



A thorough discovery process

We start with your complete financial picture — goals, income, assets, liabilities, taxes, and risk tolerance — before any recommendation.

Schedule a complimentary consultation

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