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When Trust and Long-Term Results are Important

My career had quite a different and adventurous beginning when I worked in oil exploration in the Rocky Mountains and in Alaska. The helicopter trips into the wilderness areas gave me a whole new appreciation of nature's grandeur. As exciting as the work was, I knew that it was time to further my education and attend college.

I chose Santa Rosa because I had so many fond childhood memories of spending my summers here in my family's Russian River cabin. I earned my AA degree from Santa Rosa Junior College on a Doyle Scholarship, and went on to Sacramento State University for my Bachelor of Science degree in Marketing, with an emphasis on management and finance.

Sonoma County kept calling me, and I came back in 1992 to associate with a national investment brokerage firm, one of the largest in the industry. Soon I discovered that this was my life's purpose, and I obtained my security broker's license in 1994. I thoroughly enjoy helping people reach their financial goals because it helps quantify many of the successes of their lives.

The emphasis of my practice is on building long-term relationships of trust by taking a consultative approach. The financial strategies I employ are based on a thorough understanding of my clients' current financial situation in terms of assets and liabilities, and their financial goals. The portfolio I build is based on their risk tolerance and the time horizon for reaching those goals.

Often new clients come to me when they have accumulated various assets and have a desire to get serious about retirement planning. All of my business comes through referrals from existing clients or through my chapter of Business Network International.

Comments like these tell me that I'm on the right track with my approach:

"Just wanted to say a big thank you for all the time & caring that you've shared with Fred and I. It's such a comfort to me to know that you are there!!" *Shirley, Placer County.*

"I know we've never met face to face, but I feel like I've known you for a long time. Also, you talk to me in a straight, understanding way. Our view on the important things in life is in sync, and that's what money is for. Money <u>can</u> buy happiness if used for the right reasons…." Rosemary, *Tenino, Washington.*

"…the paperwork arrived Friday. Thank you very much. You sure ARE full service and I appreciate it." *Carolyne, Sonoma County*

This is exactly why I chose to be a financial advisor.

The market downturn of 2008 and early 2009, as devastating as it was to millions of people, actually represents an opportunity to do very nicely in the long term with well chosen securities. As a broker I have access to all offerings in the marketplace. Give me a call for a no-obligation review of your portfolio.