Mission Statement

Not all financial professionals are the same. There are financial consultants and certified financial planners and financial advisors. Some of these financial professionals operate very similar to a fast food restaurant because they work for a franchise or wire house. For example, if you walk into a fast food restaurant they offer a menu of specific food items. If you want a different food item, you have to go to another restaurant. This works the same way in the financial services industry. You are restricted to the investment options the franchise or wire house offers. They all have proprietary products just like the fast food industry. I choose to be an independent Financial Advisor with LPL Financial.

LPL Financial was formed in 1989 via a merger between Linsco (established in 1968) and Private Ledger (established in 1973) and is the number one independent broker/dealer in the country *. I chose to be affiliated with LPL Financial because of their reputation of being the leading source of unbiased financial advice. I have complete freedom to offer you the products and services that meet your needs, not a franchise.

My private practice is called Empowered Wealth Management Strategies where all of my investments are offered through LPL Financial. I offer free no obligation consultations. If you choose me as your personal LPL Financial Advisor, you will not be charged a fee for your reviews. My philosophy is about building long lasting relationships where you are so happy with me that you would want to share your experience with your friends and family. Just as your life is in constant motion full of changes, your investment strategy should be flexible and adjusted accordingly. How many times have you heard the phrase "hold on, it will come back"? How did that make you feel? I have seen numerous people invest in something years ago and not one change was made in years. They lost substantial amounts of money and became discouraged. Although I cannot guarantee against any market loss, I can assure you that I will be with you every step of the way through your financial journey. Trusting in me with your investment life planning is just the beginning. It is not a onetime transaction, but a continuous face to face interaction throughout our relationship to ensure I am there when you need me most.

My commitment to you is not to transfer you to any 800 numbers or direct you to a website to obtain the forms you need. I don't like being treated this way and none of my clients will be treated this way either. I will always return my calls to you promptly within 24 hours. I will always contact you first prior to making any decisions to your investments. Our reviews together will be face to face and not just over the phone.

The choice is yours. You can choose a financial professional who works for them or a personal LPL Financial Advisor who works for you.

*As reported by Financial Planning Magazine, June 1996-2014, based on total revenue.

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