

NEW TOOLS FOR THE FUTURE

As we continue to build for the future, we are adding new software tools to help us more effectively and efficiently provide investment analytics, portfolio adjustments, and financial planning. You will start to see the output of these new technologies over the coming months.



MoneyGuidePro allows us to illustrate how different actions and choices can influence the likelihood of meeting your goals and objectives as well as provide recommendations for how best to prepare for the life you want to lead. This software also increases our planning capabilities in the areas of social security benefits, college education funding, and insurance needs.



Aquumulate is a secure, online home for viewing the status of all your financial accounts. It integrates with MoneyGuide Pro and our portfolio management software. This gives us a quick, easy way to monitor all of your accounts and allows us to consider all your financial interests when managing your portfolio and creating a financial plan for your future.



RedBlack is a set of investment management tools that streamlines and enhances our approach to monitoring, rebalancing and trading client portfolios.



Morningstar Direct gives us immediate access to the industry's best investment research, and lets us provide you with clear illustrations and interpretations of the data affecting your investment strategy.

Graduation!

Marissa graduated from Watkinson School and will be attending Elon University in the fall.

William graduated from Hamilton College and is looking forward to teaching and coaching at Salisbury School.

Mollie graduated from Miss Porter's School and will be attending Trinity College in the fall.

Photo left to right: Marissa, William & Mollie



Call Seth or Brian anytime if you would like to know more about these new tools, or have any other questions.

 860 - 521 - 2100