

THIRDLY

THE NEXT GENERATION

PRIME DIRECTIVE

- To maintain your standard of living

CAPTAIN'S LOG

- Our 28-year mission continues

WARP SPEED

- Gets you there fast, but we need the right coordinates

RED ALERT

- Doesn't mean abandon ship – it means all hands on deck

SHIELDS UP

- When markets get turbulent, your plan is your defense system

RESISTANCE IS FUTILE

- Especially when it comes to the power of compounding interest

LIVE LONG AND PROSPER

- That's not just a Vulcan greeting – it's our goal for every family we serve

SPACE... THE FINAL FRONTIER

- So is retirement – and we're here to help you explore it boldly

THE NEEDS OF THE MANY OUTWEIGH THE NEEDS OF THE FEW

- Nothing matters more than you

OUR MISSION:
*TO BOLDLY GO WHERE YOUR
FINANCIAL PLAN NEEDS TO GO*



MARK YOUR CALENDARS

INVESTMENT SUMMIT

01 Thursday, May 14th

02 Thursday, Oct 15th

