Investment Advisory Account Resources

My Approach - I represent the best interests of my clients as I approach how to provide them with solutions to their asset management needs. My premise is that no two investors are alike, and that calls for customized solutions to meet their objectives. To provide these solutions, I can work with leading third party money management firms, through an agreement with Eagle Strategies to provide the best results on behalf of our clients, including:

Brinker Capital – Brinker Capital is closely-held, with offices in Philadelphia, PA. Their focus is providing consultative investment management services to investors through independent financial advisory firms such as Eagle Strategies. Since its founding in 1987, Brinker Capital has focused on the premise that no two investors are alike. By working as a team with the investment advisory representative and independent money managers, the firm seeks to develop and implement a customized investment strategy that will chart the course by which clients will realize their goals. Brinker Capital's success is attributable to its strong leadership, due diligence process, and focus on client relationships.

SEI Investments – A publicly-held provider of institutional asset management and transaction services based in Philadelphia PA, SEI is responsible for over $200 billion of assets for individual and institutional clients. They utilize a disciplined, scientific investment process that concentrates on asset allocation and diversification among asset classes – the two critical determinates of investment planning success. Their relationship with some of the top money managers in the world is as an independent "manager of managers". Working with select financial advisers such as Harris Kagan, CLU, ChFC clients can gain access to sophisticated investment strategies typically not available to retail investors. (Link to New Ways New Answers, Investing in Turbulent Times, Discovering the Road to Financial Wellness)

Independent Advisor's Group (IAG) – As an affiliate of LPL Financial Services, IAG is the nation's leading independent broker/dealer providing wrap account programs to broker/dealers and registered investment advisers. Their offices are based in Boston, MA and San Diego, CA. IAG stresses extensive research, asset allocation strategies and fund selection. Through IAG's Market Pace program, we can bring our clients custom-designed, fee-based asset management programs built around no-load and load-waived mutual funds, ETF's, and other instruments.

Independent Portfolio Consultants (IPC) -- is closely held, with offices in Boca Raton, FL. They provide direct access to money managers to assist me with the concerns of high net worth investors. They work closely with me to develop a Statement of Investment Policy (SOP) that accurately reflects the purpose of the investments being made, and how the money management process and money manager will be evaluated on an ongoing basis. They select money managers only after a stringent due diligence process, evaluating the appropriateness of the philosophy and methodology to the needs of the client. Through IPC I am able to deliver sophisticated investment strategies to my most discerning high net worth clients.