



We are the sum of our beliefs and actions. It is crucial that we clearly understand and pursue our values and goals, and that we share a common philosophy and attitude toward our business.

Our Vision and Mission Statement:

“*Reclaiming America’s Financial Freedom* by creating leaders in financial significance. We will do this by providing creative financial strategies, by teaching and training to use innovative financial systems and methods, and by coaching to develop and master financial skills and habits. We will be a nationally recognized expert in personal financial excellence by first dominating the local market, then by conquering the regional market, and ultimately capturing the national market.”

Our Core Values:

- We live what we teach.
- We strive to live in balance.
- We seek excellence and professionalism in all we do.
- We are solution oriented, not problem focused.
- We create expectations that are measurable, challenging and realistic.

Our Beliefs:

- We believe that everyone can live a life of financial significance, regardless of the level of their means, if they choose to do so.
- We believe that personal finances are the manifestation of one’s life condition.
- We believe that success is a journey, not a destination; that failure is an attitude, not an outcome.
- We believe that genius expresses itself perfectly in simplicity; we strive for effectiveness through simplicity.

Our Operating Principles:

- We have chosen to specialize within the financial services industry by providing only exceptional quality in all levels of financial coaching, financial planning, investment management and asset protection at a profit.
- We seek first to understand and practice servant leadership.
- We teach financial strategies that are creative.
- We train to use financial systems that are innovative.
- We coach to develop and master financial skills and habits that are effective.