

A New Mission Statement

By John D. Dovich, CLU, ChFC

All successful businesses have visions, mission statements and organizational strategies. And our firm is no different. Specifically, mission statements summarize what a company does and why. A mission statement answers questions and helps people decide if they want to do business with that particular company.

Our recent growth and expansion of talent made my partners, Tom Lalley and Bill Bruns, and I began exploring where we wanted to take our firm in the future. As part of this strategic planning process, we realized our firm's vision and mission needed to evolve in order to maintain pace with where we are, and where we want to go. Ultimately, our goal was to better fulfill our client's own goals. This is our motivation behind examining our company values, strategy and the work we perform every day, on behalf of our clients.

I'm very happy to announce our new mission statement that more accurately speaks to the core values our entire team brings to our work, each and every day, on behalf of you, our clients:

**“Our mission is to help people achieve ongoing peace of mind
and long-term financial freedom.”**

We are proud of our newly updated mission statement which drives our vision and the direction of our firm. A company is not just a mission statement, though. A company is as strong as its team, and our team is very strong. Our financial advisors and investment management professionals possess an extraordinary level of intellectual rigor, evidenced by their qualifications.

While our team numbers just 15 people, our roster of credentials is quite impressive to include 4 Certified Financial Planners, 4 Chartered Financial Analysts, 1 CPA, 1 Chartered Financial Consultant, and 1 Chartered Life Underwriter, not to mention a total of 16 different bachelor's degrees and 4 master's degrees! This level and depth of industry knowledge within our team is but one indication of our commitment to you, our clients. Updating our mission statement is another commitment, as we continue to work on behalf of all of you, our clients, friends and partners.



From left: Tom Lalley, Dean Johns, John Dovich, Chris Brennan, Bill Bruns and Shawn Fishbaugh

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OUR MISSION IS TO HELP PEOPLE ACHIEVE ONGOING PEACE OF MIND
AND LONG-TERM FINANCIAL FREEDOM.