

STRATEGIC PARTNERS

Here's a little information about a few of our top strategic partners.

TD Ameritrade Institutional

TD Ameritrade Institutional helps our firm by holding and safeguarding your financial assets.

*ORION

Orion Advisor Tech is the powerful hub of our technology platforms.



Sterling Capital provides our firm with due diligence on asset managers and works alongside the AEW Chief Investment Officer.

riskalyze

Riskalyze is a software that helps our firm identify your risk tolerance level so we can use that information when creating your financial plan and assessing any updates needed to help you pursue your goals.

Chicago Accounting Consultants

Daniel Daoud is a Certified Public Accountant (CPA) with Chicago Accounting Consultants, and our go-to for all tax and accounting needs.



AE Wealth Management is an SEC Registered Investment Advisory firm that provides us with money management support.

inStream

solutions

inStream helps our firm develop a customized investment plan designed to help you pursue your goals.

As your partner in financial planning, it's our responsibility to share with you what's happening with your money after you decide to work with us.