

Why Choose Us

Our clients enjoy the peace of mind that comes from having a cohesive plan built around what matters to them most. No two situations are going to be alike, just as no two individuals are exactly the same. We take pride in designing a roadmap for our clients, which takes into account everything they wish to accomplish – paired with the strategy of preparation against uncertainties which come with life. This allows us to deliver to our clients, the legacy that tells their unique story. A story worth being remembered for, because it made a difference in the lives of so many others. This is, after all, what we are created for: to leave a positive influence on the world around us, that makes others better for our having existed. To improve lives, our community, and our world.



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Building Multigenerational Legacies

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→ Our Story

One of the things that differentiates our firm from all of the other financial planning practices you may have seen, is that we believe in having a limitless mindset; being of mind that there is no restriction or limit to what a person is capable of achieving, so long as the adequate amount of effort is applied. Sometimes the work is going to be difficult and uncomfortable, but know full well that in the end, all of the effort will be more than worth it. Nothing is more true to this viewpoint as it pertains to finance. There is no reason that an individual should not be able to achieve remarkable gains, when the correct methods are applied. This leads us to another of the things that is a differentiator in the results you receive when you are one of our clients. We will frequently structure plans and strategies that have fees and commissions in favor of our client, as opposed to our firm. Total transparency in this area is a policy of ours which will never change. We believe that we should treat others as we would like to be treated, and by doing so, the loyalty of our clients will be our reward.




→ Our Vision

Every family as well as every business should have available to them, every possible opportunity for success that they have earned. Our vision in this has evolved over the many years we have been working with our clients, to where we are today. We have forged partnerships, strategic alliances, and organizational arrangements which all work towards the one singular goal of taking each situation as a unique case, and coming up with a plan or strategy for them that will allow the best opportunity to thrive and grow to the fullest potential.

The big picture, if you will, is something that we consider with each and every situation we are approaching. Many times, there are going to be parts of the long term strategy which will involve those trusted partners working their specific area of expertise, while others in the process will have less involvement in that stage. Best interest principles are critical to this process, because without them, it is difficult to see where integrity, honesty, and character will be present. Our vetting process with any strategic ally that we involve into this process, ensures that the best possible level of due diligence, care, understanding, and respect are given at all times.

Our process with each client will be at its core, based upon a needs based approach. The overall encompassing strategy is going to belong to the client, because it is their plan, and theirs alone. We cannot at any time be more committed to the process than the client is either. The process will never work if one side is pushing more than the other, and



→ ultimately ends up becoming a waste of time and energy for all involved. This is one of the many areas where our clients will discover a difference in how we conduct business, and is in addition, how our strategic alliances are assisting them as well

→ What is a Legacy

Throughout history, there have been examples of family legacies, particularly from royals or families of means, which would have a family trust established, that in turn contained all of the family assets for use by the family, and each generation would add into that trust during their lifetime – for it to be enriched and grown for the next generation to follow. Unfortunately for our modern society, somewhere along the way, that tradition of excellence and contributing into something greater than one's self was lost.

We at Jas.Advisors.Grp intend to help our clients bring that kind of multigenerational security back. With strategic planning built around each of our client's unique circumstances, it is possible to create a plan for them which will result in producing the type of growth necessary to build a lasting legacy. One which allows each individual the freedom to choose their lifestyle, their passions, their contributions to society and the world at large, as well as their business ventures. We all have unique gifts. Those gifts are what give us the greatest joy and satisfaction, so shouldn't you be living more life and passing that ability to your descendants?

