

# Investment Consulting

*Wealth That Lasts*



**Client First.  
Every Opportunity.  
Every Interaction.**

## Family Wealth Advocates®

**At Highland, we know that Family Wealth extends beyond financial assets to include relationships, values, experiences, interests, and philanthropy.**

**We develop values-aligned strategies with you to provide holistic wealth management services that help you steward your wealth into the future and enjoy it more today.**

**What you leave behind can become larger than what you build in life.**

## Our Process

**Understand your needs and values.** By posing often unasked questions, we can discover the bedrock of what wealth means to you. With that as our guide, we help you set up your financial future while encouraging you to live with purpose and generosity today.

**Our team of experienced Investment Consultants will guide you through...**

- Establishing financial strategy, discipline, and stability
- Retirement
- Receiving an inheritance
- Navigating a large liquidation event

...and any financial event or concern standing between you and greater peace of mind.

**We deliver:**

- Quarterly meetings
- Tax aware asset management
- Goal and risk tolerance-aligned investment allocation
- Consistent rebalancing and ongoing portfolio review

## Contact Us



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