

Date News Item/Feature

24-Sep-08 We are currently scheduling Annual Review appointments for all of our investment clients, with openings throughout the month of January. If you are not currently an investment client, please call to schedule a *free* one hour Financial Planning appointment. Joe's calendar is *very* busy, so it is important to call as soon as possible.

16-Apr-08 Our hours have returned to normal after the end of Tax Season, and we are open:
 Monday through Friday 9:00am to 5:00pm
 Saturday and Sunday Closed
We will be closed for the holidays on each of the Fridays after Thanksgiving, Christmas Day, and New Year's Day.
We will begin our "Tax Season" hours on Monday, 2 February 2009.