



We're partners in your financial future.

Like a conductor coordinating a beautiful symphony, we're intimately involved in your financial future. We take the time to know how each instrument in your personal orchestra is performing, keeping all aspects of your plan in tune. We accomplish this by making sure your finances remain pliable, whether you are in an accumulation or distribution stage in life.

Full Legal Fiduciary

Not all fiduciaries are created equal. Some advisors act as fiduciaries in one area of service, but not another. Our professional credentials ensure that we are fiduciaries in all services we offer.

Personal Financial Specialist

PFS is a designation granted only to someone who is first a CPA, and has then completed rigorous additional training, testing, and work experience befitting a higher level of wealth planning.

Code of Conduct

Certified Public Accountants (CPA) have one of the most robust codes of conduct. Working with a firm that will put your interests first is crucial to a successful relationship.

Fee Based Advisory

At Arbor, we keep things simple and transparent. Your fees are on the surface; you know exactly what you pay. Our interests align, because the more you make, the more we make.

Licensed Insurance Advisors

We understand the importance of risk management and insurance. We operate as a full fiduciary, meaning our insurance strategies put the client first.

Custody with TD Ameritrade

TD Ameritrade is a large, trusted, and safe custodian. We custody our client investments with TDA, while we only have discretionary authority to trade on investments within your plan guidelines, keeping your money safe and identifiable at every moment.

Low Portfolio Expense Ratios

Why pay high portfolio costs if you're already paying an advisor? We do the work to put money back in your pocket by providing low cost, efficient, and productive portfolios.

No Transaction or Trade Fees

With TD Ameritrade's powerful platform, you can ensure the latest technology, free from platform or trade costs. This means adjustments can be implemented without affecting fractional returns, which add up over time.

Learn more at arborfirm.com

