

## Our Team

We've spent over 15 years working with individuals, couples, and multi-generational families. Our goal is to help clients make better financial decisions in a changing and complex world.



[Jeffrey Vogel](#)

Managing Director,  
Partner



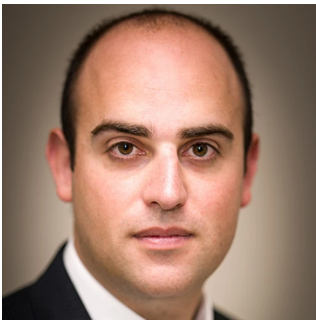
[Ruth Berger](#)

Managing Director,  
Partner



[Sadie Lanzet](#)

Director, Client Service  
and Operations



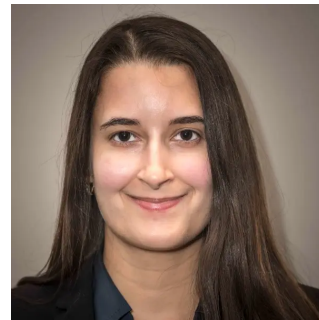
[Christopher  
DiCostanzi](#)

Director, Trading and  
Information Services



[Han Wang, CFA](#)

Associate Wealth  
Advisor



[Andrea Weldon](#)

Client Service Associate

Let's Chat

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[Overview](#)

[Team](#)

[Structure](#)

- [Fiduciary Standard](#)

- [Our Custodians](#)

[Services](#)

- [Financial Planning](#)

- [Executive Compensation](#)

- [Insurance](#)

- [Lending](#)

- [Operational Support](#)

[Investments](#)

[Resources](#)

- [Custodians](#)

- [Resources](#)

- [Reporting](#)

- [Trade Execution](#)

- [Trust Services](#)

[FAQs](#)

[Legal & Privacy](#)

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