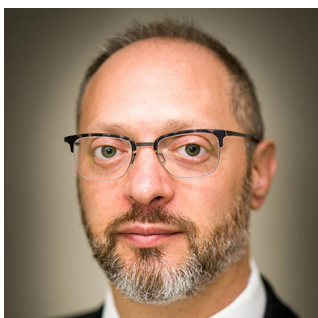


Our Team

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



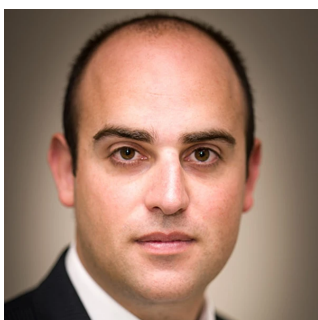
[Ruth Berger](#)

Managing Director,
Partner



[Sadie Lanzet](#)

Director, Client Service
and Operations



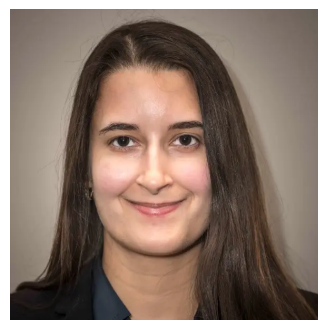
[Christopher
DiCostanzi](#)

Director, Trading and
Information Services



[Han Wang, CFA](#)

Associate Wealth
Advisor



[Andrea Weldon](#)

Client Service Associate

Let's Chat

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