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**Independent • Individualized • Investment Advice**

Fiduciary • Local  
Independent  
Since 1996

Our clients are thoughtful people who are intentional about building, maintaining and passing along their prosperity. They aspire for lives that are enjoyable, meaningful and secure.



## Independent

We founded our firm to create a new experience for our clients – an environment free from corporate mandates where your needs and goals come first.

As investment advisers and fiduciaries, we have the legal and ethical duty to put your interests ahead of ours.

Cascade does not have model portfolios or pre-determined investment lists.

## Individualized

Each portfolio is tailored for you with your time horizon, risk tolerance and investment goals in mind.

We build custom portfolios based on financial plans, your input and our research into asset allocation, current economic data, tax issues and more.

We encourage collaboration with your tax professional, attorney and family to ensure desirable outcomes.

## Advice

Your goals. Your dreams. Your outcomes. Our work starts with understanding what motivates you and what type of life you want to live.

We believe advice is the core strength we bring to our clients.

Through our work, we've gained experience that helps people sort through key issues as they make important life decisions.