Polaris Financial Partners, LLC

Our Mantra: *"Serve First - Always" – "We believe in the notion that by placing our client's best interest at heart - first and foremost at all times – that everything else will simply fall into line…"*

Our Values:

- We acknowledge that our clients are the foundation of our practice, and it is for that reason we strive to provide and an exceptional experience for our client and an impeccable level of service as well.
- We recognize that strong and consistent communication is the cornerstone to a lasting and meaningful relationship with our client.
- We believe in a results oriented and process focused relationship with respect to how we work on behalf of each client.
- We genuinely care about and have a vested interest in the success of our clients' goals and objectives as well as those of their family.
- We believe in the entrepreneurial spirit of the United States of America; furthermore, we believe that the small business owner is the cornerstone to our nation's prosperity.
- We work with individuals who believe in the concept of becoming "net savers and not net spenders" over time as well as those who understand the wisdom of living beneath their means in order to accumulate wealth on behalf of their family.
- We understand as advisors to our client that our primary role is to act as educators, leaders, and catalysts in order that each of our clients' may achieve their respective goals and objectives within their specific tolerance for investment risk.
- We aspire to be actively involved in various civic and philanthropic organizations and donate our time to these valuable causes in our community.
- We believe in working with a eclectic array of clientele recognizing that strength through diversity is one of the most meaningful ways in which we can build a strong community.

Our Vision:

"Our vision is to become a financial planning practice that demonstrates leadership in our community, both locally and nationally, with our objective being to become an international leader in our profession."

Our Mission Statement:

Our mission is to create a meaningful and enriching experience for our client during each phase of the financial planning process - with our ultimate objective being to improve the quality of life for our client so that his or her goals, objectives and visions of the future may indeed come true.