



We're thrilled to share a major milestone in the history of our firm! After 21 years as a solo-owned practice, Mary Sterk is welcoming new partners to join the leadership team: Amy Heaton, Kelsey Bankey, Julie Chadwick and Jordan Ireland.

These talented women have each demonstrated exceptional dedication, care, and expertise in serving our clients. By stepping into partnership, they represent the next generation of leadership at our firm — ensuring our values, our fiduciary promise, and our culture of putting clients first remains strong well into the future.

And don't worry — Mary Sterk isn't going anywhere! As founder and CEO, she will continue leading the firm, mentoring our team, and guiding investment strategy for clients. This transition is about adding strength, not stepping away.

We are incredibly proud of this moment: a team of female leaders, working together to shape the future of financial planning, while staying true to the mission that started it all — helping you and your family thrive with financial confidence.

*“When we hit our 20 year anniversary I asked myself how the firm could continue to serve clients for decades to come.”* said Mary Sterk. *“Now, by welcoming Amy, Kelsey, Julie and Jordan as partners, we secure the firm’s future and reinforce our commitment to delivering trusted financial planning for generations in the future.”*

Thank you for being part of our journey. The best is yet to come!