ADK Wealthcare Partners
"Fundamentally different by design"

Practice Distinctives

We believe that people have unique aspirations.

- Therefore we listen and design strategies and monitoring systems around your unique priorities and resources.

We believe planning, accountability, context, credentials and capabilities are fundamentally important in the pursuit of successful financial outcomes.

- Therefore this framework is woven into our practice.

We believe people need ongoing guidance to remain confident in their life journey.

- Therefore we employ sophisticated financial planning tools, risk controls, unbiased research, disciplined investment strategies, and timely feedback to help keep you on track.

We believe people need trustworthy guidance and comfort that they are heading in the right direction.

- Therefore we embrace the belief that outcome measurements should revolve around client objectives first and foremost.

We believe that context drives strategy.

- Therefore we access respected sources from around the globe and take worldview, geopolitical, and economic factors into consideratrion—as they all influence financial markets.

We believe that competence should not be taken for granted.

- Therefore we stay current, maintain professional credentials that extend beyond the realm of industry licensing, and work with professionals who have also paid the price that excellence demands in their respective fields.

We believe that extensive capabilities are needed in today's complex and interdependent world.

- Therefore we associate with Charles Schwab & Co., Inc., Envestnet MoneyGuide, RIA in a Box, and other preeminent entities in order to provide the depth and breadth of products, services, support, and oversight clients need.