

Considering independence?

Let me help make the process clear.

Are you at a crossroads?

Exploring independence can feel overwhelming—but it doesn't have to. Fidelity offers a confidential, unbiased framework to help you understand your options and find the right long-term fit for you, your practice, and your clients.

I'm your advocate, not a recruiter

No pressure, just honest guidance. I'm here to help you cut through the noise, avoid the unwelcome calls, and make a confident decision—whether that means making a move or confirming you're already where you belong.

I've been in your shoes

With over 11 years of experience in this business, I understand the questions, concerns, and complexities that come with considering a transition—because I've lived them. With me, you'll have a peer who "gets it"—someone who is focused on simplifying the landscape and helping guide you through it.



Finding the right fit

I often describe the landscape to advisors like this: You can build your practice like a custom home. Many firms try to sell you a pre-designed house, well-built, but not always suited to how you actually live or work. I bring you the full set of blueprints. Whether you want to design your own RIA from the ground up, create a hybrid structure, plug into an established firm, or join a boutique broker-dealer, my focus isn't on steering you into a model—it's on helping you build something that truly fits you, your practice, and your clients.

What you can expect—a proven, thoughtful process

Our work together is a structured journey designed to bring you clarity and confidence at every step:

Discovery

We uncover what matters most to you—must-haves, deal-breakers, and guiding priorities.

Education

I help clarify your options, aligning each path to your vision for the future and your distinct goals.

Introduction

I connect you with the right contacts, to help ensure conversations move you forward.

Decision

We weigh the choices together, so you can make an informed decision with complete confidence.

If a move makes sense, I'll continue to serve as your dedicated resources and advocate—not just through the transition, but for your entire first year.

Let's talk—confidentially and without obligation

Whether you're ready to make a move or just want to understand your options, I'm here to help. Ready for a complimentary consultation that brings clarity to your next step?

Call or text: (617) 392-8510

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