

Investing well is a key part of reaching your financial goals. At Twin Peaks, we offer advantages that can make a difference.

On Your Side

As an independent firm, Twin Peaks is free to offer completely objective investment guidance. We aren't beholden to any company, investment or strategy. Your best interests are our only concern.

The Right Investments

We provide access to virtually every type of investment strategy available in the marketplace. That means we can create an investment portfolio tailored to your unique situation, goals, preferences and core beliefs. Our strategies may be executed with:

- Index funds
- Actively managed funds
- Exchange-traded funds
- Separately managed accounts of individual securities

The Best Managers

No individual or firm can be the best at every type of investment strategy. Twin Peaks selects what we consider to be the best and brightest asset management firms to serve our clients.

This approach creates teams of respected investment professionals for our clients, and does so in a highly efficient manner. What's more, this approach often translates into lower total investment costs. And lower costs result in greater total returns.