

ABOUT US

At JOYN, we believe that money is merely one tool for creating a meaningful, fulfilling life. We achieve this through the integration of exemplary wealth management, proven investment strategies, the confidence of sound decision-making, and the wisdom of behavioral science.

That's why our brand of wealth management goes far beyond finance to incorporate what we call a passion for the human factor.

Better Decisions. Better Life.



WEALTH MANAGEMENT

Our mission is to help you achieve your financial goals without the anxiety that even affluent families can feel when it comes to money. We believe the entire purpose of wealth is to create a better life, and our definition of wealth goes far beyond your balance sheet.



STRESS & DECISION MAKING

Stress is a problem for your health, brain function and decision-making process. We apply recent brain science to training and coaching materials that seek to mitigate stress and prevent impulsive decision-making.



LIFE EVENT EXPERIENCE

You only live once, so navigating experiences like retirement, selling a business, and divorce can be stressful. Our team has guided clients through these events for years. We can help you evaluate the choices, costs, risks, and opportunities—both quantitative and qualitative.



PASSION FOR THE HUMAN FACTOR

We're all human, not rational robots. So if you call us feeling anxious about your portfolio, we don't launch into a financial lecture. Instead, we dig to find the root cause of your concern and then focus on a potential solution. Our passion for the human factor comes first. It's our culture, it's our credo, it's our purpose.

JOYN®

THAT'S WHERE JOYN COMES IN

Since Behavioral Wealth Management goes far beyond traditional wealth management, we aim to create a totally different experience for our clients. We're here to do more than simply help you build your wealth. Our deeper mission is to help you USE your wealth to create an extraordinary, joyful life.

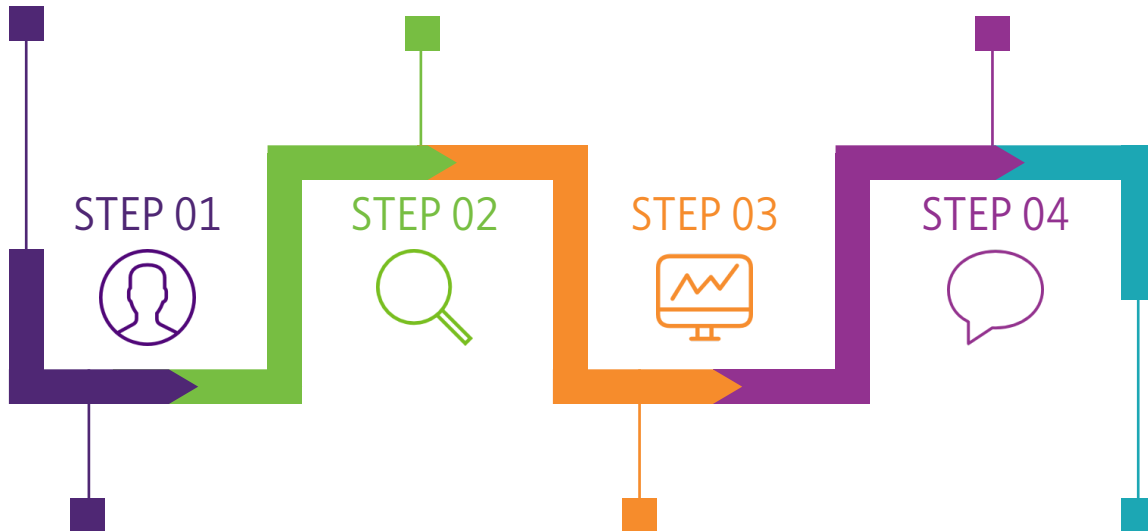
JOYN'S BEHAVIORAL WEALTH MANAGEMENT INVESTMENT PROCESS

DISCOVER GOALS

Using our proprietary behavioral wealth management tools, our specially trained advisors work to help you hone in on what is most important.

COMMUNICATE & REITERATE

We share insights on market trends and keep you abreast of your investment process so you worry less and live more.



STEP 01



STEP 02



STEP 03



STEP 04



EXPLORE THE HUMAN FACTOR

JOYN's process acknowledges that behind every financial decision is a human being, not a robot; cognitive biases, emotions, and experience affect all our decisions.

BUILD DIVERSIFIED PORTFOLIOS

We seek to create portfolios to give you the income you need in the short term and the growth you need in the long term.

LIVE THE LIFE YOU CHOOSE

We never forget money is a tool to help you live a joyful, extraordinary life.

1 HOUR COMPLIMENTARY CONSULTATION WITH A JOYN ADVISOR

CONTACT US
TO SCHEDULE:

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