Client-centered and holistic wealth management

Advice done well.

We're in the business of changing lives for the better. Every client has a unique story and distinct financial needs — from wealth building and investing to addressing family matters and legacy planning. At &Partners, advisors have the flexibility and choice to excel at what they do best: serving clients in highly personalized ways.

Dedication

&Partners is committed to impeccable service and support. We don't use impersonal call centers or service bots. We have adopted an on-call mentality across our operational and investment functions. That means enhanced client experiences, heightened responsiveness and a more customized approach to managing your wealth.

Proofpoint: Advisors at &Partners have dedicated operational and investment specialists who help to address concerns, answer questions and resolve any issues that arise. Our focus on offering consistent, one-to-one coverage to advisors is differentiated and allows them to serve you better.

Focus

We focus on one thing at &Partners: delivering financial advice in the best way possible. At &Partners, competing interests don't create roadblocks for advisors in delivering high-quality service to their clients or conflicts with regard to manager selection. With an open and agile platform, we are constantly building better.

Proofpoint: &Partners offers core-satellite portfolios designed to provide attractive risk and return characteristics across different levels of risk tolerance. Unlike many wirehouse solutions, our advisory models are built on the premise of seeking the lowest-cost mutual fund share class available to us.[1] A dollar saved on fees is a dollar added to potential returns.

Wealth is the ability to fully experience life. HENRY DAVID THOREAU

1. &Partners seeks to utilize the lowest-cost share classes for inclusion in advisory models subject to prospectus/fund restrictions.

Opportunity

We know robust planning can reveal new opportunities. We will be engaging with tested advisory software such as MoneyGuidePro plus newer fintech applications as we seek to be on the forefront technologically. That means we emphasize combining new ideas and well-proven practices to address client needs.

Proofpoint: At &Partners, we are exploring newer applications such as Holistiplan, a tax planning solution that can allow your advisor to work in a more integrated way with your tax professional.

Investment acumen

Advisors at &Partners are supported by tenured investment professionals and a concierge CIO team. We draw on the breadth of product offered through Envestnet and our partners in the alternatives space to build finely tailored solutions. Unlike larger firms, we are not limited by capacity and therefore can seek out managers that evidence an ability to consistently produce excess return.[2]

Proofpoint: The collective experience of our investment team is notable. Our investment professionals have led large asset management organizations and managed billions in assets under management across different asset classes. We regularly engage with advisors and undertake bespoke investment analysis. We can assist in identifying ways to explore how to improve after-tax, risk-adjusted returns over time by incorporating a broad range of active strategies, passive exposures, and alternative investments.[3]

At &Partners, our mission is to create a place where advisors can thrive and clients can achieve their financial goals with confidence.

Visit us at andpartners.com

2. Past performance is not necessarily indicative of future results and, depending on your circumstances, the managers we use may not always be those that have consistently produced excess returns.

3. Alternative investments are not appropriate for all investors and carry different and greater risks, than other investments. Please discuss whether these are appropriate for your situation.