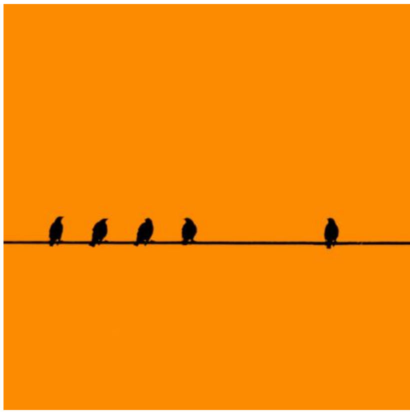

Individuals & Families

Team

Jonathan M. Bentley, CFA
J. Timothy Delaney
Nicole F. Gagliardi
Karen B. Golding
Benjamin P. Lewis, CFA
Diana B. Malcom
Mark R. McCallum
M. Cameron O'Leary
David H. Polansky, CFA
Erika A. Rhuda
Jessica C. Welch

Services

Investment Management
Financial Planning
Personal Trusts & Fiduciary Services

Overview

It is our privilege to work with individuals and families seeking to protect and enhance their financial futures.

While each client has unique aspirations, our experience shows that what all clients want more than anything is an advisor they can trust with their assets and financial plans so they can get on with living life. This is why we go to such lengths to avoid all possible conflicts of interest, champion transparency and provide truly independent, unbiased advice.

Much of our work with individuals and families is driven by important life events – retirement, marriage, births, deaths, the sale of a business, inheritance, downsizing, major medical events, and so on. It is during these pivotal events that people need professionals they can turn to with questions knowing they will get helpful and thoughtful answers, delivered in a way they can understand. With deep experience in these situations over the last five decades, our team is able to respond with the perspective and insight clients expect and value.

Many of our client relationships span multiple generations. This continuity over decades helps families not only efficiently pass assets from one generation to the next, but also share family values about wealth and prepare next generations to act as responsible stewards of family assets.

