We Work For You

We are a team of independent, fiduciary financial advisors. Our open source platform gives us access to advanced research and technology in the investment marketplace. We advise accounts at many of the best-known financial firms in the United States, including Charles Schwab, Fidelity, and BNY Mellon. We can utilize investment products from companies throughout the entire financial world. However, we do not work for any of these companies. We work for you.

Financial Advice You Can Trust

We are legally obligated to put your interests first. We have no incentive to recommend one company's products over another's. We, and our entire company, have no lines of business other than advising and serving you. Our only job is to provide you with the facts and strategies you need to be financially successful. You trust our advice because you know that our team works for you.

We Are Here When You Need Us

We are here when you need a financial advocate and confidante, when you experience a major life event, and when you simply need to get things done.

Reach out to us when:

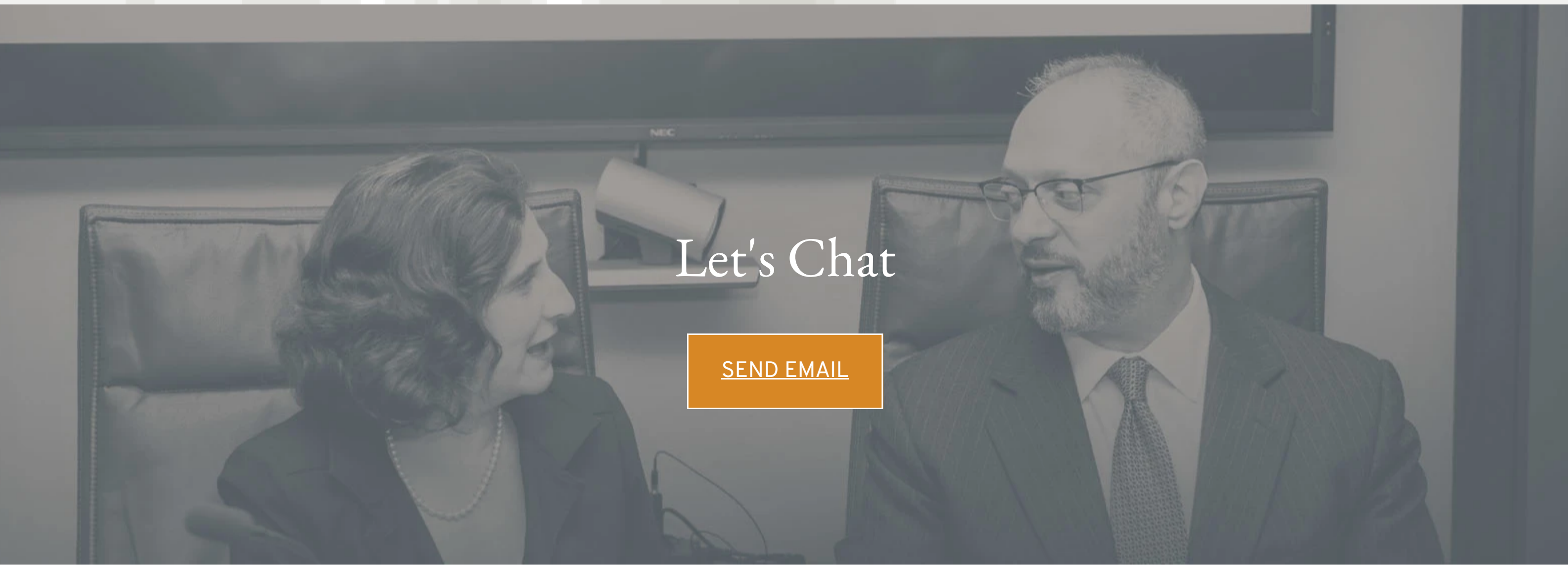
- You want to retire
- You're changing jobs
- You might lose your job
- Your stock options went up
- You want to buy a home
- You're getting married
- You're getting divorced

- You want to save for college
- You want an insurance review
- You may have too much money in your concentrated company stock
- You don't understand your stock options and/or your concentrated company stock
- You want to communicate better with

- You want more tax efficient investments
- You want advice about paying for long-term care
- You want advice about estate planning
- You want to contribute to charity
- You want to plan your legacy

your family about money

Ruth Berger named to Forbes' 2019 Best-In-State Wealth Advisors list!



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Overview
Team
Structure
- Fiduciary Standard
- Our Custodians
Services
- Financial Planning
- Executive Compensation
- Insurance
- Lending
- Operational Support
Investments

Resources
- Custodians
- Resources
- Reporting
- Trade Execution
- Trust Services
FAQs

Legal & Privacy
Web Accessibility Policy