The New Cycle of Wealth Management

Tandem Asset Management is changing the way the advisory platform is structured. We are a low-cost, fee based, concierge advisory firm that is committed to servicing the specific needs of our clients through a family office style approach.

We know that our clients needs are as diverse and dynamic as the markets themselves and it is our job to ensure their portfolios represent their individual objectives.

Tandem is committed to investor alignment, value generation, wealth preservation, personal attention and thorough communication. Clients financial goal's simplified.

We understand that good communication starts by simplifying the message.

Portfolio Management

Estate Planning

Tax & Risk Management Strategies

Options Overlay Strategies

Secondary & Private Equity Deal Flow

Family Office Services

"Most investors, both institutional and individual, will find that the best way to own common stocks is through an index fund that charges minimal fees."

Warren E,. Buffet
Chairman and CEO, Berkshire Hathaway, Inc.

"All the time and effort that people devote to picking the right fund, the hot hand, the great manager, have in most cases led to no advantage."

Peter Lynch
Former Fidelity Magellan Fund Manager

Board of Advisors

Wesley Kennedy
Founder

As a former investment banker, Wall Street (debt and equity) research analyst and finance teacher, Wesley's career meets at at the intersection of entrepreneurship, education, and finance. Notable firms include SVB, Ziegler, Green Street Advisors, Thomas Weisel Partners and his current endeavor Sift.

Sift's sole mandate is to convert finance from a skill-set to a tool-set in an effort to help support both students and entrepreneurs

Jonathon Lotter
Managing Partner

As managing partner and founder of Appian Capital, Mr. Lotter is primarily responsible for developing relationships with real estate operators, structuring investments, and overseeing the management of investment strategies.

Mr. Lotter began his career in institutional capital management at Franklin Templeton and Barclays Global Investors (now BlackRock) before founding Appian Capital in January 2000.

Derek Bentley
Partner

Derek is a Partner in the New York office of Greentech. He has several years of experience as both a principal investor and strategic advisor, having executed numerous M&A, corporate finance, and project finance transactions for single assets and asset portfolios. Derek joined Greentech from Bank of America Merrill Lynch, where he was a Director in the Energy & Power group within Investment Banking.