

LINDBROOK CAPITAL

(<https://www.lindbrookcapital.com/>)

OUR MISSION IS TO EXCEED OUR CLIENTS' INVESTMENT GOALS BY PROVIDING THE HIGHEST LEVEL OF UNBIASED AND INDEPENDENT INVESTMENT ADVISORY SERVICES TAILORED TO THE SPECIFIC NEEDS OF EACH INDIVIDUAL CLIENT.

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Our services



Investments

We build custom allocations based on client risk tolerance/capacity, liquidity needs, and personal

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Active Tax Management

Lindbrook offers several strategies to help maximize tax efficiencies and delay unnecessary realized gains. Lindbrook is continuously monitoring portfolios and conscience about taxes during rebalancing and allocating. As part of our fund and manager research, we are extremely mindful to tax implications any fund we allocate to might incur.



Retirement Plans

Lindbrook acts as the investment advisor for multiple company retirement/pension accounts and has several options for company plans.



Performance Reporting

Lindbrook uses Advent Black Diamond for comprehensive performance reporting. We offer a wide range of reporting capabilities on alternative investments, outside assets, and accounts held at multiple custodians.



Charitable

We manage several charitable foundation accounts and work with Fidelity Charitable for multiple clients to manage donor advised accounts, process donations, and send out grants.



Estate Planning

We work with trusted lawyers to guide clients thru the estate planning process. We have helped dozens

of clients navigate their estate planning from beginning to end.

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Senior Management

+ Tyler Dritz, CFA, Partner ()

+ Benjamin Posen, Partner ()

Contact Us



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Your Name:

Phone Number:

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