

# Transparency.

Years of experience have taught us that transparency is far from the norm in the financial services industry. Everyone, it seems, is hiding something. Fees, excessive commissions, unrealistic assumptions, complex products, and opaque pricing models allow providers to profit handsomely at your expense. Nothing cripples a portfolio and damages a relationship more than deceptive behavior. That won't be a problem at Rootstock.

[Learn more about us](#)

## About Rootstock

Rootstock is smart, trustworthy wealth management for individuals and families with five million or more in investable assets. We stand opposed to the arms-length, markup-driven world of large wealth management corporations by providing objective, independent counsel and building fruitful, lasting client relationships. Ours is a simple, effective philosophy: we treat you (and your money) like we would want to be treated; we'll be here when you need us.

Our passion for clients and strong desire to provide an efficient, personal alternative to traditional wealth management made the formation of Rootstock inevitable. After years of witnessing conflicts of interest first-hand, we resolved to take a different approach. As a result, at Rootstock your investment managers are truly independent advisors. They receive no commissions and work to make your fees go down, not up. We believe managing money is simple: increase asset returns, decrease costs. If we're successful, our clients retain more wealth and we can rest assured that our job has been done well.

Learn more about [our team](#).

## Our Values

### Fairness

No commissions. No kickbacks. No referral fees. We provide unbiased advice and reliable, comprehensive wealth management for a single reasonable fee.

### Honesty

We left the high-fee, low-visibility world of large wealth management corporations to establish long-term, honest relationships with our clients. Conflicts of interest, big or small, impede wealth creation, and we're not going to let anything keep us from us doing what's right for our clients.

## **Transparency**

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## **Excellence**

When you partner with Rootstock, you place your trust in us. In return, we promise to work tirelessly to identify investment opportunities and control risk. We encourage our employees and our clients to embrace our mission: to provide a different kind of wealth management experience, one defined by business excellence and personal integrity.

## **Accountability**

At Rootstock, we're responsible to our clients, to those we work with, and to the communities we serve. We don't take that responsibility lightly. Our accountability to you is a daily habit, and it's one we think you'll appreciate.

## **Independence**

Rootstock is 100% privately owned by firm associates. Our only compensation is the fee we receive to advise your family. No products, no commissions, no conflicts. Our recommendations are completely objective and agenda-free. Our clients enjoy the priceless insights that come from our independence.

## **Contact us**

Rootstock is now accepting clients with \$5 million or more in investable assets. If you'd like to meet to discuss your financial future, please call or email us at...

(412) 205-8817 or [hello@rootstockadvisors.com](mailto:hello@rootstockadvisors.com)

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