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Bronfman Rothschild

Bronfman

True partners in wealth for individuals, families, institutions, and retirement plans

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How Can We Help?

Established

Professionals

(<https://www.belr.com/retirement-plans/corporate-participants/>)

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Institutional

Investors

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Retirement

Individuals

Sponsors-

Families

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WHAT SETS US APART?



OUR PRINCIPLED ADVISORS AND TEAM

While we are legally bound by the fiduciary standard of care, acting in a client's best interest is much more than a matter of regulatory compliance. We build our business upon this basic tenet and have created a team of advisors and staff who demonstrate integrity at every opportunity.

[MEET OUR TEAM \(HTTPS://WWW.BELR.COM/WHO-WE-ARE/MEET-THE-TEAM/\)](https://www.belr.com/who-we-are/meet-the-team/)



A DISCIPLINED INVESTMENT STRATEGY

As a firm, we take a long-term approach to investment management, routinely communicating to clients that this is a proven strategy. The expertise that exists among our advisors, as well as the processes and platforms available to us firm-wide, help each advisor maintain a thoughtful, disciplined approach.

[LEARN MORE ABOUT OUR INVESTMENT STRATEGY \(HTTPS://WWW.BELR.COM/OUR-INVESTMENT-STRATEG](https://www.belr.com/our-investment-strategy)



ACCESSIBLE CLIENT CARE

We take time to listen, learn, and understand, especially at critical turning points for each client. We believe in proactive communication and understand that there is no substitute for having a reliable partner in your corner. We structure our service teams to provide ongoing support to each client while also drawing on the collective resources we employ as a firm.

[ABOUT US \(HTTPS://WWW.BELR.COM/WHO-WE-ARE/\)](https://www.belr.com/who-we-are/)



OUR GENUINE FOCUS ON A CLIENT'S NEEDS

Understanding client goals and needs goes far beyond simple facts and figures. It requires a trust-based relationship, something only accomplished over time and through repeated demonstration of real respect for client goals and objectives. The collaborative nature of the relationship is manifest in the advice they receive; they know they have been heard.

[LEARN MORE IN OUR CASE STUDIES \(HTTPS://WWW.BELR.COM/INSIGHTS/CASE-STUDIES/\)](https://www.belr.com/insights/case-studies/)

News & Insight

<p>NEWS SIGHTS/CPSZ/QRV/BELR.COM/INSIGHTS/CPSZ/QRV/NEWS/PRESS RELEASE (HTTPS://WWW.BELR.COM/INSIGHTS/CATEGORY/PRESS-RELEASE/) JUNE 24, 2019</p> <p>JD Kath Earns CSRIC Designation (https://www.belr.com/insights/jd-kath-earns-csric-designation/)</p> <p>Kath acquires first major financial credential dedicated to sustainable,</p>	<p>BELR BLOG SIGHTS/CPSZ/QRV/BELR.COM/INSIGHTS/CPSZ/QRV/NEWS/BLOG/) JULY 2, 2019</p> <p>A Guide to End-of-Life Planning (https://www.belr.com/insights/end-life-planning/)</p> <p>By Aviva Pinto, CDFA™, Director Although planning for end-of-life can be emotionally fraught and daunting, organizing affairs well before the...</p> <p>END-LIFE-</p>	<p>BELR BLOG SIGHTS/CPSZ/QRV/BELR.COM/INSIGHTS/CPSZ/QRV/NEWS/BLOG/) JUNE 20, 2019</p> <p>Weighing Your Options on When to Take Social Security (https://www.belr.com/insights/your-options-on-when-to-take-social-security/)</p> <p>By Crystal Wipperfurth, MBA, CRPC®, CFP®, Wealth Advisor Determining when to start</p>	<p>BELR BLOG SIGHTS/CPSZ/QRV/BELR.COM/INSIGHTS/CPSZ/QRV/NEWS/BLOG/) MAY 24, 2019</p> <p>Stock Buybacks: The Battle of Perception vs Reality (https://www.belr.com/insights/stock-buybacks/)</p> <p>By Chris Maxey, Director, Investment Research Recent years have seen growing popularity in</p>
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responsible, and impact
(SRI) investments.
INSIGHTS / THE
24,
(https://www.belr.com)

[PLANNING/\)](#)

[\(HTTPS://WWW.BELR.COM/INSIGHTS/JD-KATH-EARNS-CSRIC-DESIGNATION/\)](https://www.belr.com/insights/jd-kath-earns-csric-designation/)

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[HTTPS://WWW.BELR.COM/INSIGHTS/WEIGHING-YOUR-OPTIONS-ON-WHEN-TO-TAKE-SOCIAL-SECURITY/\)](https://www.belr.com/insights/weighing-your-options-on-when-to-take-social-security/)

share buybacks, the
company
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