

Mon-Thurs: 8am-5pm

Friday: 8am-12pm

(850) 866-2314

info@shorelinepartners.com (mailto:info@shorelinepartners.com)

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# SHORELINE PARTNERS

WEALTH MANAGEMENT

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## Wealth Management (<http://fxtm3.hosts.cx/services/wealth-management/>)

Our wealth management goal and process requires that we work in partnership with our clients to establish wealth management and financial plans designed to meet their goals, not the models of others. We strive to help our partners stick to plans and enhance their peace of mind by having full transparency and translating the complex into simple terms and solutions.

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## Financial Planning (<http://fxtm3.hosts.cx/services/financial-planning/>)

When it comes to financial planning, we believe all investors should have a written and documented financial plan and investment policy statement. Investments should be the means to an end, not a competition, and financial plans should be based on the client's goals, not the models of others.



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[Fiduciary Commitment \(http://fxtm3.hosts.cx/services/asset-management/\)](http://fxtm3.hosts.cx/services/asset-management/)

Shoreline Partners Wealth Management (SLP WM) has made a firm commitment to act as a fiduciary and provide investors with transparency into all that we do. [\(https://shorelinepartners.com/\)](https://shorelinepartners.com/)

Many firms say they take a fiduciary approach and some say they have fiduciary values.

We find, however, that many firms and professionals who use the word fiduciary are not holding themselves to the true fiduciary standard of care, and importantly, are not bound to act, or in a position consistently to act, in a manner that puts their clients' interests above their own.

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## What We Offer

A key to any successful investing is starting with a purpose and a sound plan. Our portfolio management methodology not only incorporates industry best concepts and practices, but also adopts and incorporates the latest academic research.

[View Our Services \(http://fxtm3.hosts.cx/services/\)](http://fxtm3.hosts.cx/services/) →

## Our Values

### Our Values

Driving all we do are our core values. Many firms say they are different because they offer access to unique value-added strategies or proprietary processes. At Shoreline Partners, we believe what matters most is how we treat people.

We strive to produce results that help our partners achieve their goals, but often are told that the greatest value we provide is transparency, simplicity and peace of mind.

Maybe the best way to describe our values is to talk about What We Will Not Do and What We Do versus having the classic “value added” bullets.

## What We Will Not Do

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[What We Will Do](#)



**SHORELINE  
PARTNERS**  
WEALTH MANAGEMENT

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## Frequently Asked Questions

Does Shoreline Partners have custody or access to our investment accounts?

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How do I pay Shoreline Partners for their services?

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What client is ideal for Shoreline Partners?



## Experience

Being a firm founded by a recovering CPA uniquely positions Shoreline Partners. Our emphasis is on working exclusively with high net worth individuals and business owners versus most similar firms. Given this background, we take a holistic view and provide advice on topics most (yes even some CPAs) do not have the professional experience to accurately advise upon.



## Goal-Oriented

We take a goal-oriented approach to investing for our clients based on their needs and goals, not solely on their risk tolerance. Our approach integrates financial planning and investment management which insures that our clients' goals are funded in an efficient manner. This approach to investing was first employed by pension and university endowment funds in managing their investments and is considered an industry best practice.



## Fiduciary

We hold ourselves to the highest standard of care, the fiduciary standard, this requires we only work for and in the best interest of our clients, whom we refer to as partners.

The most important assets we manage are the personal relationships we share with our clients, whom we refer to as partners.

# Request a Call Back to Schedule a Complementary Analysis

The goal of Shoreline Partners is to give our clients, whom we call partners, greater peace of mind. We simplify the complex topics and provide full transparency into the structure and performance of investment and wealth plans, so they are optimized to meet our partners' goals. We offer a complementary analysis of your current investment plan that will include the total current cost of the portfolio, a personalized risk assessment, and a customized alternative that fully discloses all fees. Reach out today to schedule a complementary analysis.

Your Name:

I am most concerned with:

Your Email: Required

Your Phone Number:

Submit

# WEALTH MANAGEMENT

408 West Baldwin Road  
Panama City, FL 32405

Phone: (850) 866-2314

Mon - Thurs: 8am - 5pm

Friday: 8am - 12pm and by appointment

Saturday: By appointment

Sunday: By appointment

## Explore

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## Our RIA

Advisory services offered through Hayden Royal LLC, an SEC-registered investment advisory firm. Shoreline Partners may only conduct business with residents of the states for which they are properly registered.

## Recent News

[New Website Online! \(https://shorelinepartners.com/new-website-online/\)](https://shorelinepartners.com/new-website-online/)

April 3, 2018

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