

PRIVATE WEALTH MANAGEMENT

INVESTMENT BANKING

MERCHANT BANKING

## Firm Overview

*Superior Talent and Steadfast Dedication*

Bruderman & Co is a multi-generational, privately held financial services holding company committed to providing its clients with the highest level of service. Our subsidiaries and affiliates consist of: a registered broker-dealer, a registered investment advisor, a merchant bank, a mutual fund, and an insurance agency. We satisfy the needs of ultra-high-net-worth individuals and closely held businesses, offering trusted advice drawn from generations of experience.

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Bruderman Asset Management incorporates institutional-quality money management services, state-of-the-art financial planning and family office services to construct and implement plans that help clients meet their goals and address their greatest concerns and aspirations. The Bruderman family has three generations of experience and proven results in managing wealth, and the full suite of services offered by Bruderman Asset Management are designed to assist clients in all stages of their personal and professional lives.



WEALTH MANAGEMENT



CASH MANAGEMENT



BROKERAGE SERVICES

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# Investment Banking

*Elevating the experience*



Bruderman Brothers, LLC is an independent, privately-owned investment bank that serves a diverse clientele and has built its superior reputation on uncompromising integrity. Our team focuses on providing sophisticated advice to middle-market business owners. We have expertise in a broad range of industries and are pleased to offer both merger and acquisition and corporate finance solutions.



Strategic Advisory  
(Sell-side/Buy-side)



Capital Raising



Strategic Consulting



Leadership Recruiting



Personal  
Transaction Planning

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## *Opportunistic investments*

Our Merchant Banking platform is an independent division of Bruderman & Co that specializes in deploying capital in both minority and control investments in the lower middle-market. We employ a broad investment strategy and make opportunistic investments across all asset classes and industries. The firm forms true partnerships and aligns its interests with highly motivated, proven, and successful management teams.



INVESTMENT PROFILE



INVESTMENT CRITERIA

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**"For three generations, Bruderman & Company and its affiliates have been providing trusted financial advice to individuals, families and corporations. We benefit from a long-standing reputation for knowledge, integrity and relentless commitment to our clients."**

**Matthew J. Bruderman, CHAIRMAN**

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