



Niche Financial Services Inc. is a financial consulting firm established in 1998. The founder has been in the industry for over 30 years. We consider ourselves in conjunction with our strategic partners capable of providing valuable insights and planning to the business owners and individuals we serve. Our clientele consists of both individuals and companies looking to solve both simple and complex employee benefits and personal planning issues.

Some of the products and solutions that we provide include; individual personal planning, fee based and hourly advisory services, group health insurance solutions, 401(k)'s, pensions, profit sharing plans, simple IRA's, SEP's, individual retirement accounts, and income replacement plans.

Niche Financial Services develops strategies for small business owners that help control costs while striving to maximize non-payroll benefits for employers and employees.

Niche Financial Services with their affiliates strives to help companies develop valuable, cost efficient programs appreciated by all employees.

Niche Financial Services provides ideas and solutions to help individuals work towards their personal, financial, tax, and retirement goals.



Call – 610-941-6900

Our advice is motivated by client needs and not by corporate affiliation.

Our Investment Philosophy

Risk Balanced Allocations

Our core investment strategies center around exposures to various global asset classes, while factoring in all investment costs for the client. It is designed to manage risk and protect wealth during a variety of global market cycles. We see many investors mistakenly assume that by merely owning thousands of securities, they are effectively diversified. This is not always the case, and in some instances may potentially increase the volatility in their portfolio.

Business Cycle Agnostic

Investments that perform when times are good are well known. But what about during recessions and economic downturns? Niche Financial Services offers strategies engineered to perform during all stages of the business cycle, not just the good times. We combine a fundamental understanding of global markets, insights from a host of leading institutional managers and an advanced risk management framework to profit from global economic developments, good or bad.

Enlightened Risk Management

Every asset class has unique market conditions (we call them macro risk sensitivities) where they languish. Properly executed, diversification reduces risk by neutralizing the market vulnerabilities of some holdings with the offsetting strengths of others. Sadly, many investors confuse holding hundreds or even thousands of positions with "effective diversification". Having more positions does not always lead to portfolio risk reduction. Instead of diversifying, many are unintentionally magnifying the same market risks shared by many similar positions. Diversification means managing risk.

Call For a Free Consultation

(610) 941-6900

Your Name

Your Email

Phone Number

Information Request

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Understanding a portfolio's shared vulnerabilities is the key to safeguarding it. We use advanced institutional risk management tools and techniques to measure and mitigate risk within our strategies and effectively diversify.

Global Multi-Asset Opportunities

The global market place is rarely without opportunity. That's because the same market conditions creating headwinds for one group of investments often translate into tailwinds for others. We invest globally and across asset classes in order to profit from the broadest set of global opportunities. The proliferation of ETFs have made accessing these opportunities easier and more affordable than ever.

Disclaimer

Securities offered through Coastal Equities, Inc., Member FINRA/SIPC. Advisory Services offered through Almanack Investment Partners, LLC. Almanack Investment Partners, LLC is not affiliated with Niche Financial Services, Inc. Neither Almanack Investment Partners, LLC or Niche Financial Services, Inc. are associated with Coastal Equities, Inc.

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