

(<http://marquettewm.com/>)

We work with you to build and protect your  
financial future.

Learn more about our services

We offer integrated wealth management services for individuals,  
families, and institutions.



Headquartered in Minneapolis, we tailor our boutique services to meet your needs and goals.

## Our Firm

**Independence, integrity, and objectivity, delivered by professionals with decades of experience.**

We manage the wealth of affluent individuals and families throughout the United States.

Find out who we are and what we stand for > (<http://marquettewm.com/the-firm/>)



## Wealth Management

### **Personalized investment management and financial and estate planning support.**

Our expert guidance begins with our initial meeting. We work with you to gain a thorough understanding of your overall situation, needs, expectations, beliefs, and goals. We employ objectivity and discipline to help you stay the course toward your long-term objectives.

Read about our wealth management services > (<http://marquettewm.com/wealth-management-services/>)



We listen carefully to understand your individual financial situation and allocate your portfolio accordingly.

## Asset-Class Investing

**An objective, time-proven approach designed to smooth volatility and enhance total return.**

Your asset allocation and diversification will be the primary determinants of your investment performance. Asset allocation focuses on how best to allocate among the broad categories of stocks, bonds, and cash. Within these broad categories, diversification considers which asset classes should be included in your portfolio and in what proportions. We allocate your assets to balance risk and potential reward in a way that best fits your particular situation.

Learn more about asset-class investing > (<http://marquettewm.com/asset-class-investing/>)



We develop a personalized Investment Policy Statement, our roadmap for managing your finances.

## Our Process

**A process that reflects your risk tolerance, needs, goals, time horizon, and evolving circumstances.**

We work with you to establish a customized portfolio and review it with you regularly to make sure your investments and financial plan stay on track.

Explore our process > (<http://marquettewm.com/our-process/>)

(612) 661-3770 | (866) 661-3770

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