JA Glynn Private Wealth

Discernment

Flexibility

Customization

Savvy individuals and families turn to JA Glynn Private Wealth for customized investment management and financial advisement. Our discernment and nuanced understanding of your investment needs and priorities help us partner with you to make sound, enduring decisions with the money you’ve worked so hard to accumulate. An investment philosophy grounded in flexibility and nimbleness enables us to respond decisively to economic shifts and new market opportunities on your behalf, an approach critical to preserving principal and outperforming the market.

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DON'T ACCEPT GENERIC ADVICE. Our clients have unique needs and goals. We don't follow or impose formulaic asset allocation models on you, nor do we sell other firms' products. We're patient when investing new money and we transition existing portfolios in a tax-sensitive, disciplined manner.

BE PICKY ABOUT WHAT YOU OWN. Now more than ever, it's crucial to invest in the highest quality growing companies rather than broad index funds. Years of low interest rates created incentives for companies to irresponsibly leverage their balance sheets with cheap debt. Avoiding these companies is key to preserving capital when markets correct. Our in-house investment offerings typically contain only 25-50 companies that reflect our best ideas.

KNOW YOUR TEAM. Our clients can pick up the phone any time and speak directly with our portfolio managers, the team that makes the daily decisions on buying, selling or holding each stock. We welcome conversations about our investment rationale and we ensure each portfolio reflects the right mix of securities for you to meet your investment goals.

YOUR EXPERIENCE MATTERS. Many of our clients have invested their own portfolios for years and/or have industry insights from their careers. We value the experience you bring to the table and we can incorporate your ideas into our approach.

COLLABORATION IS CRITICAL. We work proactively hand-in-glove with your accountants, estate planning attorneys and other trusted advisors.

YOU HAVE THE RIGHT TO FULLY UNDERSTAND THE FEES YOU PAY. We don't charge hidden fees. Because we independently construct and invest our own portfolio strategies, you pay us only one layer of completely transparent fees.

YOUR LIFESTYLE SHOULD IMPROVE WITH AGE. Whether you are still working or retired, our investment approach is designed to address capital preservation along with prudent growth. When you are ready to retire, you and your family should continue to enjoy the lifestyle you aspire to.

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PRIVATE WEALTH

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ADV 2A Appendix 1

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The DOL Rule

Business Continuity Plan