

Warning: getimagesize(/usr/services/vux/apache/htdocs/wordpress3/wp-content/uploads/2016/07/check-logo.png): failed to open stream: No such file or directory in /data/22/2/32/28/2521680/user/2762683/htdocs/wordpress3/wp-content/themes/bridge/includes/shortcodes/shortcode-elements/slider.php on line 356

A FULL-SERVICE FIDUCIARY INVESTMENT

WE PROVIDE FINANCIAL ADVICE AND MANAGE PORTFOLIOS ON BEHA

FAMILIES

Families often have issues that extend beyond financial assets. We are experts in helping these families think about the long-te

FOUNDATIONS/NON-PROFITS

Balancing growth needs with distributions can be a challenge. We have experience matching assets with upcoming liabilities to count.

TRUSTS

HOW WE HELP

HEALTH MANAGEMENT | *CUSTOMIZED PORTFOLIOS*

Our goal at Boltwood Capital Management is to help our clients make the best financial decisions possible both for themselves and their families. We believe that only after understanding your unique circumstances can we build an investment strategy tailored to your needs and goals.

We believe in modern portfolio theory which is founded in the award-winning research of Dr. Eugene Fama. This strategy focuses on minimizing risk and volatility by broadly diversifying across multiple asset classes and international markets.

Learn more about our approach to [INVESTMENT MANAGEMENT](#)

 ORIGINAL RESEARCH

 INDEPENDENT THINKING

 FOCUSED PORTFOLIOS

FINANCIAL PLANNING | *LONG-TERM PLANNING*

At Boltwood Capital Management, our core value of doing what is right, above all else, for the client drives us. Our advisors have extensive experience in building client-specific financial plans to meet their unique needs. Whether you are an individual, trust, or tax-exempt entity we will find the best possible solution for you seriously.

This commitment pushes us to find, not an adequate, but the optimal course forward for you.

We encourage you to learn more about our [FINANCIAL PLANNING SERVICES](#)

EXPLORE

We encourage you to explore our site and learn more about our firm.



WHY CHOOSE BCM?

Learn how our belief in building deep relationships separates us from other advisory firms



MEET OUR TEAM

Learn more about the individuals who make up Boltwood Capital Management



FAQ

and answers to questions that you may have about Boltwood Capital Management