Welcome to Linwood Investment Advisors, Inc.

Welcome to Linwood Investment Advisors, Inc. Thank you for visiting our site. We are a boutique, independent, fee-only registered investment advisor. We offer unique portfolio solutions tailored specifically for the risk tolerance of each of our clients. Our solutions include concentrated separately managed equity accounts, diversified risk-based asset allocation models and “combination” core/satellite strategies. We provide funds selection and other consulting. We custody the majority of assets we manage at Schwab Institutional, Fidelity Institutional, and TD Institutional. Please contact us if you have any questions on our asset management services and thank you again for visiting our site.

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- Bloomberg
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- Seeking Alpha

Whatever your goals, we can help you get there

What are your goals?

From investors who want to protect their assets to those who need to grow their assets we can develop a portfolio to match the risk and return needed to meet the goal. As independent, fee-only advisors we are unconstrained as to the solutions we can use to build a portfolio that will provide the appropriate investment solution to meet your long-term goals. We evaluate the risk tolerance and long-term goals of every client and develop solutions to manage the risk inherent in the investment process. We understand the trust placed in us and we always protect the interests of our clients first. We are fiduciaries and we work diligently to bring unique solutions to client portfolios.

Learn More

Contact

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