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WE INVEST IN YOU BEFORE YOU INVEST WITH US  
*WEALTH PLANNING & INVESTMENT MANAGEMENT SERVICES*

[PITTSBURGH, PA \(/CONTACT-US/PITTSBURGH-PA/\)](/CONTACT-US/PITTSBURGH-PA/)





WINTHROP'S  
PLANNING PROCESS (/FINANCIAL-PLANNING-PROCESS/)



THE WINTHROP  
TEAM (/OUR-TEAM/)



WORKING WITH  
WINTHROP (/WORKING-TOGETHER/)





THE WINTHROP  
DIFFERENCE (/OUR-DIFFERENCE/)

# OUR CLIENTS INCLUDE



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Winthrop Partners Pittsburgh May 2018 v1 current



## WHO WE ARE

Winthrop Partners was founded to provide independent, conflict-free financial planning and investment services to every client. Our founders understood that this method is the only way investment services should be delivered. Our core value of “we invest in you before you invest with us” is the key to our culture. We know that every client situation is unique and every client deserves our complete and collective expertise and attention prior to making a decision to work with Winthrop.

Winthrop Partners Oct 2018 Doylestown



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## EXPERIENCED TEAM

Founded in 2015, Winthrop is a fee-only fiduciary operating as a registered investment advisor in Buffalo, Pittsburgh and Philadelphia. Our commitment to our clients is that we will always be on their side. We will never try and sell products or take commissions from others. We act exclusively in our client's best interest.

[MEET OUR TEAM \(/OUR-TEAM\)](/our-team)

[\(/contact-us/doylestown-pa\)](/contact-us/doylestown-pa)



## DOYLESTOWN, PA (/CONTACT-US/DOYLESTOWN-PA)

Winthrop Partners EPA,LLC  
25 North Main St, 2nd Floor  
Doylestown, PA 18901



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## BUFFALO, NY (/CONTACT-US/BUFFALO-NY)

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835 Washington St, Suite 118  
Buffalo, NY 14203

(/contact-us/pittsburgh-pa)





PITTSBURGH, PA (/CONTACT-US/PITTSBURGH-PA)

Winthrop Partners WPA,LLC

101 East Swissvale Avenue

Pittsburgh, PA 15218

## WHAT MAKES US DIFFERENT



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Investments and markets fluctuate over time. As professionals, our job is to enable you to make informed financial decisions using the full complement of resources at our disposal. This process provides a framework for making decisions and monitoring the outcome of those decisions over time. Each step involves interaction between our team, the client and outside professionals if needed.

### EMPATHY

We take the time to actively listen and understand you and confirm what we hear.

### FIDUCIARY

We put you before us. We negotiate for you, not against you.



### EXPERIENCE

With over 150 years of combined experience this isn't our fourth rodeo. Even with this experience we aren't a bunch of old codgers wedded to yesterday's solutions.



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## FEE-ONLY

We receive one clearly aligned fee and accept no commissions or other third party fees that could sway our recommendations.

## EXECUTION

Knowing what to do, how to do it and when to do it are three separate skills. Intelligence defines these skills and experience hones them. He who makes the fewest mistakes wins.



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## CONTACT INFORMATION

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[Winthrop Partners Pittsburgh \(/contact-us/pittsburgh-pa\)](/contact-us/pittsburgh-pa)

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## NEW CLIENT WORKSHEETS

[Financial Document Checklist \(https://www.winthroppartners.com/wp-content/uploads/2018/05/document\\_checklist.pdf\)](https://www.winthroppartners.com/wp-content/uploads/2018/05/document_checklist.pdf)

[Life Values Worksheet \(https://www.winthroppartners.com/wp-content/uploads/2018/05/life\\_values.pdf\)](https://www.winthroppartners.com/wp-content/uploads/2018/05/life_values.pdf)

[Financial Planning Timeline \(http://www.raymondjames.com/branches/library/features/financial\\_timeline/pdfs/timeline.pdf\)](http://www.raymondjames.com/branches/library/features/financial_timeline/pdfs/timeline.pdf)

## FINANCIAL RESOURCES

Barron's Online (<https://www.barrons.com>)

Fortune (<http://fortune.com>)

Investors Business Daily (<https://www.investors.com>)

USA Today - Money (<https://www.usatoday.com/money/>)

Wall Street Journal (<https://www.wsj.com>)



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