Turn insight into action.

Through innovative strategies and the power of investing, Windham's dedicated team
of specialists provides personalized plans for all your wealth management needs.

30 Years of Excellence

Windham remains committed to continuing its legacy of advancing the science and practice of investment management, delivering the best products and highest quality service to its valued clients.

Personalized Wealth Management

Discovery & Analysis

We begin with an in-depth discussion and comprehensive review to learn more about your financial situation and what matters most to you and your family. We focus on all aspects of life that may affect your investment objectives, including your investment experience, risk tolerance, and the time horizons for your various goals.

Investment Policy Implementation

After our holistic review of your unique situation, the analysis performed during our initial meetings helps us to develop a set of investment guidelines. We incorporate your risk considerations, tax situation and the time horizons that are best suited to meet your stated goals.

Monitoring & Outreach

Our process does not end with portfolio implementation. We maintain an ongoing and trust-centered relationship with you to track progress towards your goals and make changes to your plan over time. From these ongoing discussions, we tailor our outreach to include the topics that matter most to you.

Your financial goals are about real-life needs.

Interested in learning more?

Please provide your name and email and we will contact you as soon as possible.

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