

TRUE FINANCIAL TRANSPARENCY

In a financial industry largely driven by
sales,
Socius is an ally you can trust.

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O C I U S

COMMITTED ADVOCATES, FAITHFUL ADVISERS

Socius is an independent multi-family office that advances your interests, manages your affairs, and provides peace of mind.

102

**CLIENT FAMILIES
PROUDLY SERVED**

24

**STATES ARE HOME
TO SOCIUS CLIENTS**

24TH

**FASTEST-GROWING
RIA FIRM IN THE U.S.**

95%

CLIENT ASSET RETENTION RATE

WITH OFFICES IN

FLORIDA & PENNSYLVANIA

AND CLIENTS ACROSS THE USA



[CONTACT US TODAY](#)

A SINGLE POINT-OF-CONTACT FOR YOUR FINANCIAL LIFE.

Let your wealth enrich your life instead of complicating it—Socius manages all your financial affairs.

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EVIDENCE-BASED, DATA-DRIVEN INVESTING.

Secure peace of mind in markets good and bad—Socius builds portfolios around your needs and desires.

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UNBIASED INSIGHT INTO ALL YOUR FINANCES.

Get a second opinion on your financial health—Socius aims to uncover savings worth 10x our fee, or your audit is free.

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READ MORE ABOUT SOCIUS

“YOUR VISION BECOMES OUR
COMMITMENT”

About

OUR CLIENTS

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TALK TO SOCIUS TODAY

**SCHEDULE
YOUR
FIRST
MEETING
WITH OUR
TEAM**

OUR INFO

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