



## INNOVATIVE WEALTH MANAGEMENT

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Satovsky Asset Management (SAM) is a New York City based boutique independent registered investment advisory (RIA) firm. We serve the financial needs of sophisticated multi-generational families, business owners, endowments, pensions, 401(k) plans, charitable institutions

Satovsky Asset Mana...



and individuals around the world. Our holistic, personal approach to wealth management considers your entire financial picture and enables us to create an investment structure aligned to your unique set of goals. We embrace solutions leveraging the latest in digital technology as well as a more traditional investment experience.

OUR  
STORY

SAM  
DIGITAL

GET IN TOUCH

## OUR UNIQUE APPROACH



### ALIGNMENT

As an independent investment advisory firm, our main priority is to align our interests with those of our clients. We take a long-term approach to investing with the goal of achieving optimal returns over time.



### CURATED PORTFOLIOS

We believe in providing truly personal financial advice tailored to each client's established goals. Asking the right questions enables us to clearly identify your true vision.



### MINDFUL STRATEGIES

We are mindful of the gap between investor and investment returns known as the behavior gap. We help our clients focus on what is really important – meeting financial goals while avoiding common pitfalls.

HOW WE HELP

## LATEST POSTS

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Jonathan Satovsky - 05/14/2019- ...



### SAM Video Blog May 14, 2019

In honor of Mother's Day, Jonathan discusses women and their role in investing in our culture. He also explains how patience in current market conditions will lead to investor success over the long term.

### SAM Video Blog April 12, 2019

Jonathan discusses taxes, 1st Quarter market performance, and the persistency of factors in the markets. He further explains how owning a globally diversified portfolio tilting toward small, cheap, and

### SAM Video Blog March 14, 2019

Jonathan discusses mindfulness, March Madness and the math of money. He explains how awareness, discipline and collaboration are essential to building wealth over time.

### SAM Video Blog February 14, 2019

Jonathan discusses Valentine's Day loving habits and mindset for investing in profitable businesses for a lifetime. Concentration to get rich and diversify to stay rich, the simple concept that

## FEATURED ON

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Forbes



Bloomberg



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