

STOLPER & CO.

CALL US
888.STOLPER
(888.786.5737)

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Since our founding in 1975,our business premise has been simple.

As the investment world has stampeded toward complexity, we find our high net worth and foundation clients embrace clarity and simplicity. In a collaborative way, we help our clients craft durable investment solutions. As your financial advisors we then implement the investment plan always cognizant of the fact that it must be in harmony with the clients financial and temperamental requirements. Our job is to create an outcome that can be described as effective and serene, i.e., a sense of sanctuary.

Having money is not the same as hanging on to it, or growing it.

Your money should be organized in a way that supports your lifestyle, not a template from a consumer finance magazine. We have found that problems associated with money resolve when people become clear about what they want in their financial investments.

Financial planning is essential if you want to enjoy the rewards of your hard work. Do you want to ensure that your children and grandchildren are well provided for? Is philanthropy your passion? Our job as your financial advisor is to help you create a hierarchy of needs and assess the consequences of failure. Problem solved.



The best thing money is going to do for you is make your life a little more pleasurable and give you some security. - Michael Stolper

Our methods are designed for families and foundations, not modified from a pension fund platform. We have client relationships throughout the country representing high net worth individuals, retirement plans, endowments, and foundations.

Stolper & Company is dedicated to providing the most comprehensive financial investment services for its clients. All of our staff members strive daily to accomplish our goal of creating effective and serene financial and retirement investment plans leaving our clients to enjoy their financial sanctuary.

How long have you been in the business of investment management?

Michael Stolper founded the firm in 1975.

What is the minimum account size that you will manage?

\$3 million.

What rate of return can I expect on my investments?

We strive for better than benchmark returns. We try to achieve the optimal balance between high returns and low client anxiety.

Where will my securities be held?

We will choose the custodian based on administration competence and cost.

How often will I get investment progress reports?

We will provide performance reports quarterly. Your custodian will provide you with monthly statements.

How do you select the investment managers for my funds?

We assemble a short list of investment managers that have one striking characteristic, they are in our studied opinion "moneymakers."

Schwab Account Access

[Please click here.](#)

Stolper Performance Reports Access

[Please click here.](#)

Stolper & Company

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We encourage you to call us: **888.STOLPER** (888.786.5737) if you have questions or you can email us according to your needs to the following below:

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