(https://www.guardinv.com/)

Since **1976**

WEALTH & ESTATE PLANNING

As a fiduciary, we help our clients make consistently smart financial decisions to help them grow their wealth. Our advice is unbiased and we always put our client's needs first.

INVESTMENT MANAGEMENT

Our investment strategies seek to identify companies that use shareholder capital in a disciplined way, have strong financial strength and attractive valuations in the market.

SPECIAL SITUATIONS

We help clients with unique situations such as diversifying concentrated holdings from stock options, minimizing taxes from capital gains and interest and socially responsible investing.

Our Clients

Individuals

We provide fiduciary investment management and advice to individual clients and their families. From young professionals with stock options to retirees with steady income needs, we offer financial advice for every situation.

Institutions

Whether it’s working with consultants, pension plans, foundations, non-profits or corporations, we have the skill and expertise to manage fully customized investment solutions for small or large institutional clients.

Sub Advisory

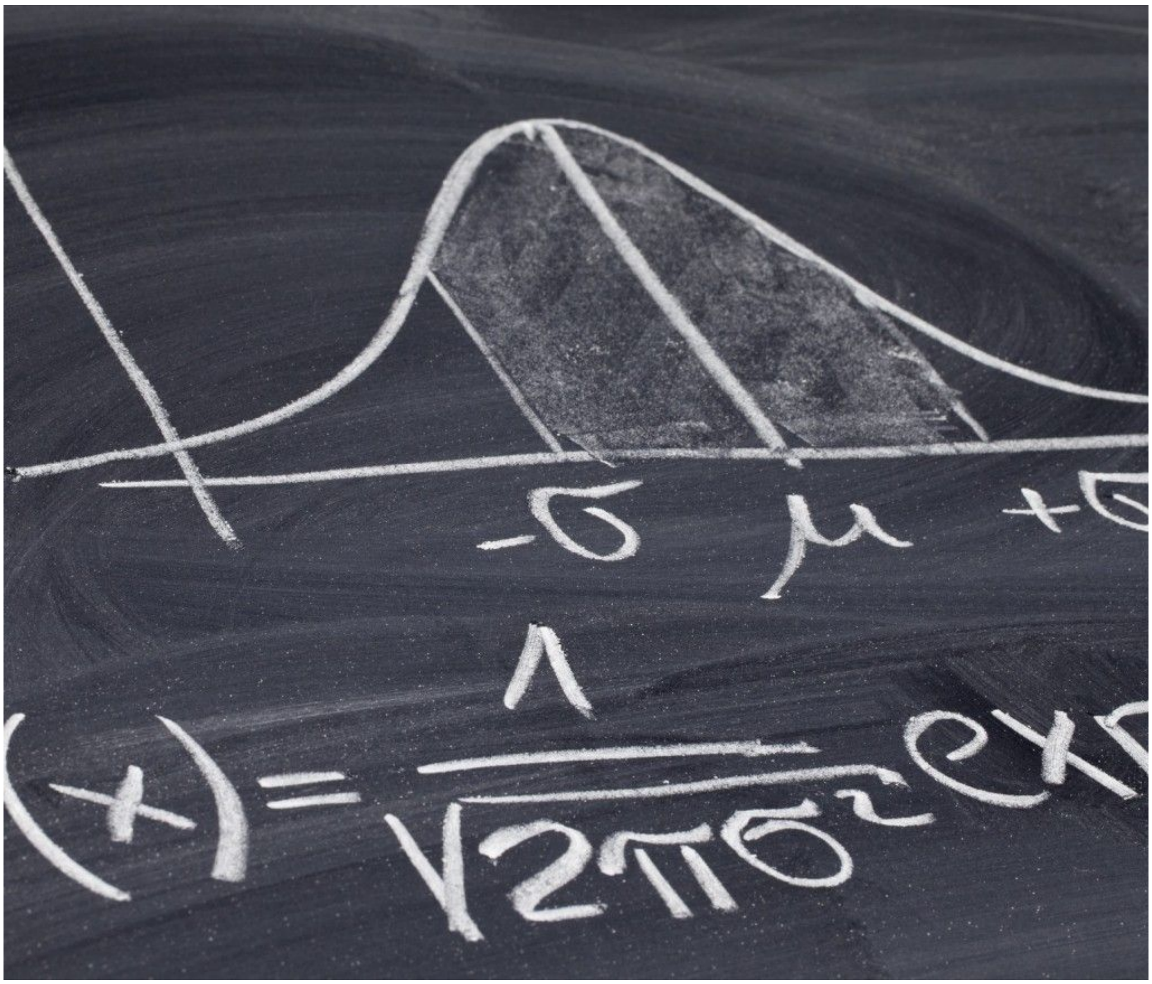
We offer sub-advisory investment services to firms that don't manage their clients' assets internally. We have a 40 year track record as fundamental value managers and have been independently verified for GIPS compliance.

"We believe the longevity of our track record, which spans over 40 years, is a testament to our success in meeting our clients' investment objectives."

-BOB TOMASELLO, PRESIDENT & CO-FOUNDER

Investment Options to Suit All Clients

We offer both active and passive strategies as well as several overlay options. Our active investment strategies are conservative in nature and are designed to provide current income, moderate capital appreciation, and protect principal against inflation and adverse market events. We look for high quality companies with strong management and a consistent dividend track record that are considered undervalued by the market. Some strategies use options to reduce portfolio risk and increase current income.



[See Our Investment Strategies (/investment-strategies)](/investment-strategies)

Schedule a Free Consultation

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Form ADV Part 2

Regulations require that we disclose information about our firm annually. Download our Form ADV Part 2 here. (/docs/Guardian_Form_ADV.pdf)

Privacy Policy

We're committed to protecting your privacy. Learn more about how we protect your personal information. (/docs/Guardian_Privacy_Policy.pdf)

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