



The Cypress Difference

Client Focused. Conservative Investing.

Located in Greenville, Delaware, Cypress Capital Management (“Cypress Capital”) has provided portfolio management services since 1984, catering to individuals, family trusts, charitable organizations, foundations, endowments, and corporate pension and profit-sharing plans. Acquired by WSFS Financial Corporation in 2004, Cypress Capital operates independently and our Investment Policy Committee comprises only Cypress Capital employees. As of 3/31/2018, Cypress Capital has more than \$905 million in client assets under management.

Our Focus and Values

We focus on conservative, cost effective portfolio management while pursuing a dynamic and disciplined investment strategy. Our balanced investment approach, which includes both equity and fixed income securities, offer the potential to profit in advancing market cycles while attempting to protect against major loss of principal in downturns. Our conservative investment management style emphasizes above average income, less volatility and risk, and looks to achieve reasonable capital growth.

We are committed to a **client-centric focus**, tailoring portfolios to our clients’ risk appetite and goals. We take a hands-on approach to managing each relationship, ensuring access to our executive team as well as our portfolio managers. We offer a high level of client service, including individual meetings, detailed reporting and quarterly bulletins covering the firm’s outlook on the economy and its current investment strategy. With an average of 25 years investment experience, Cypress Capital’s investment professionals share distinguished careers that have spanned multiple market cycles, creating the distinct advantage of expertise bolstered by experience.

WEALTH MANAGEMENT AND INVESTMENT SERVICES

- » INVESTMENT PHILOSOPHY
- » INVESTMENT STRATEGY
- » PORTFOLIO MANAGEMENT
- » FOCUS ON SERVICE

CONTACT US

For more information, please [email us](#) or call [302.429.8436](#).

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SEC INFORMATION

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