



Welcome to Wealth Management. Welcome to Woodstock.



Welcome to Woodstock, a Boston private wealth management firm, managing more than \$630 million* in assets.

** As of March 31, 2018*

For nearly 90 years, we have provided highly personalized portfolio management services, financial counseling, personal trust and fiduciary services, and investment services to high net-worth individuals and their families, trustees, corporations and philanthropic institutions. We invite you to learn more about how we can put our experience to work for you.

Woodstock Named to CNBC's List of "Top 100 Fee Only Wealth Management Firms for 2015"

[Go to CNBC full report](#)

Woodstock: Who We Are

▶ **WATCH NOW**

Woodstock: Working for You

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Our Goals

Providing Superior Asset Management and Financial Services

As one of the oldest Boston private wealth management firms, Woodstock has a clear and simple mission: to create and preserve wealth for our clients. We work with you to formulate an investment strategy and provide the asset management services that we believe will best help you achieve your goals and secure your financial future.

We are dedicated to meeting or exceeding our clients' expectations, both in terms of investment performance and the additional financial advisory services we provide, especially in the way we work with clients. We are committed to delivering unparalleled service. We provide frequent communication, encouraging the kind of open exchange that builds confidence in us as financial advisors and that fosters peace of mind for you.



encourages strong personal relationships.

- More control over gain and loss tax exposure through ownership of individual securities, rather than mutual funds or strategies managed by third parties, except when appropriate.
- In-house research that ensures our investment ideas are thoroughly reviewed and understood by all portfolio managers and financial analysts.

We invite you to contact our **portfolio managers** to learn more about our financial advisory and management services.

Is Woodstock Right for You?

- Do you want to work with a private wealth management firm with a long-term history of investing client assets?
- Do you value an ongoing, personal relationship with your financial advisor?
- Is a customized program incorporating a full range of service capabilities important to you?
- Do you want a firm small enough to react quickly and responsively to your needs, yet large enough to provide in-depth investment and financial services?

If so, we invite you to learn more about our experienced, Boston-based **investment management services** and explore a relationship with Woodstock.

Your name

Email



Our History

Financial Advisory Services for Nearly 90 Years

Woodstock was founded in 1929 in Boston, Massachusetts, to handle the financial concerns of William A. Paine, founder of Paine Webber & Company. As a private wealth management firm, Woodstock prospered, and other investors sought our counsel and personal service. These origins set the tone for a company that, five generations later, remains a family-owned business committed to providing superior asset management, financial support services and highly attentive assistance to a select clientele around the world.

Please [contact us](#) for detailed financial performance information.

Today, Woodstock Corporation offers customized portfolio management and financial counseling, while our related company, Woodstock Services Company, focuses on the wide range of accounting, tax and custodial management needs of our clients.

Ultimately, our success is reflected in the longevity of our client relationships, many of which are measured in generations. We are small enough to provide a high degree of personal attention, but large enough to provide a remarkable depth of financial advisory and wealth management services.



Woodstock Corporation was named after Woodstock, Connecticut, the birthplace of the father of William A. Paine. In 1928, W
Paine told *The American Magazine*: *"My philosophy is simple: The great thing in business is to know what you want to do. Th
do it."*



info@woodstockcorp.com

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