Our commitment to clients.

As a fiduciary, we place our clients' interest first. This is why our firm holds the independent CEFEX Investment Advisor certification, and has annually renewed the certification every year since 2008.

Click on the video to learn more.

Video Source: CEFEX.org

(https://youtu.be/xkAJBNZzPR4)

SERVICES

Financial Planning

Whether you are just starting out, contemplating retirement, or looking to leave a legacy, we can help develop and execute a plan to help you achieve financial wellness. We use the latest technology to help clients define and prioritize goals and put financial decisions into perspective.

Asset Management

We believe that our unique 'core-satellite' approach which blends low-cost beta options with cost-effective alpha seeking solutions can help achieve the best results for our clients. All portfolios are constructed with your individual goals in mind and are managed & monitored using cutting-edge software.

Company Sponsored Retirement Plans

Our well-rounded team has decades of experience in retirement plan administration, investment management, and fiduciary governance. We can help alleviate the burden of managing your retirement plan and lead your participants to better financial outcomes.

Have questions? Please don't hesitate to reach out!

CONTACT US (HTTPS://WWW.WEALTHQB.COM/CONTACT-US)

(A+B+C) INVESTMENT PHILOSOPHY

AT GORDON ASSET MANAGEMENT, LLC, WE USE A SIMPLE (A + B + C) APPROACH TO INVESTING.

THIS PHILOSOPHY BLENDS ALPHA-SEEKING INVESTMENTS WITH LOW-COST BETA EXPOSURE AND CAPITAL PRESERVATION OPTIONS. THE NET RESULT IS A WELL DIVERSIFIED AND COST EFFICIENT PORTFOLIO.

Alpha

Return-seeking options

Beta

Low-cost market exposure

Capital Preservation

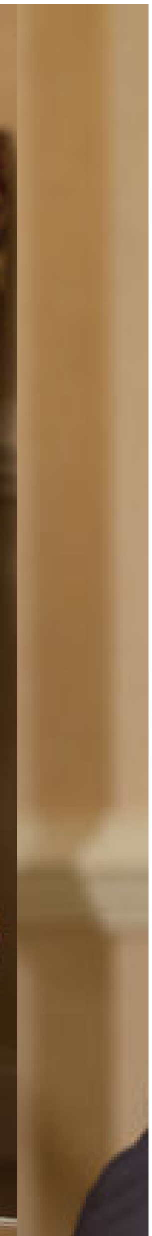
Non-correlated & safe money

MEET OUR TEAM

Joe Gordon

CIMA®, AIFA®, CPFA, CFP®

Joe founded Gordon Asset Management, LLC in 2001 and has over 30 years of professional experience in the financial services industry. Previously, Joe was a majority owner of both an investment advisory firm and a 401(k) record keeping firm



Todd

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dating back to the early 1980's. A graduate of the University of North Carolina, Joe focuses on business development and client relationship management and is a co-chair of the Investment Policy Committee

Adminis was vot 2015.

Get in touch

Name *

First

Last

Email *

Comment or Message *

Submit

GORDON ASSET MANAGEMENT, LLC

Gordon Asset Management, LLC is a North Carolina based investment advisor specializing in personal wealth management for individuals and company sponsored retirement plans. For more information about our firm, refer to our Form ADV Part 2 (https://wealthqb2019.wpengine.com/wp-content/uploads/2019/02/GAMLLC-Form-ADV-Parts-2A-2B-2018-03-29-FINAL.pdf).

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(https://www.cefex.org/rmark/CefexRegistration.aspx?qryRegistrationNumber=4%2bGM9WoDZG27bpJ5g4vTiA%3d%3d)