



# 1620 Investment Advisors, Inc.

Your Long-Term Financial Partner



1620

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## Investment Advisors, Inc.

1620 Investment Advisors provides investment management and research services to individuals, business owners, and financial services firms. Our investment advisory assets total approximately \$128 million.

Whether you are investing for the future, preparing for retirement, or simply need straightforward, conflict-free investment advice, 1620 offers

products and service levels that meet your needs.

INDIVIDUALS . BUSINESS OWNERS .

- ADVISORY RELATIONSHIPS . RESEARCH SERVICES

## Why 1620?

### **INDEPENDENT**

As an independent investment firm, we have no incentives to favor certain investment products over others. Our only financial relationship is with our clients

### **FOCUSED**

We are an investment advisory firm. We do not try to sell insurance or other products to our clients. Investment management is what we do all day, every day.

### **EXPERIENCED**

Our investment professionals have an average of over 20 years of investment experience, in addition to advanced degrees and relevant professional designations (e.g., CFA charter)

### **DISCIPLINED**

Our investment process focuses on avoiding the emotionalism that can occur in the markets on a day-to-day basis. We have multiple tools to monitor the risk/return trade-offs in our clients' portfolios.

### **FEE-BASED**

Our compensation is based on the value of the assets we manage for our clients, not on the trading activity generated in the accounts. We are never compensated through sales charges or referral fees. Our fees are very competitive with those of other firms.

### **MOTIVATED**

All of our investment professionals have an ownership stake in the company or revenue-sharing opportunities. These incentives keep our staff motivated and focused on our ultimate goal: the financial success of our clients

**ACCESSIBLE**

**TAX-SENSITIVE**

We know our clients are the lifeblood of the company. We pride ourselves on providing the highest levels of client service and creating custom investment solutions for our clients.

We are acutely aware of the effects that taxes can have on an investment program, especially for those clients in the highest tax brackets. We work closely with clients to ensure that their assets are invested in the most tax-efficient manner possible to maximize after-tax returns.



## CONTACT US

**FEEL FREE TO CONTACT US WITH  
ANY QUESTIONS OR INQUIRIES**

508-830-4778 | [Info@1620ia.com](mailto:Info@1620ia.com)

### **OUR ADDRESS**

36 Cordage Park Circle, Suite 217  
Plymouth, Massachusetts 02360

### **DIRECTIONS**

**From Boston:**

Route 3 South to Exit 9 (Kingston). Left onto Route 3A South. Follow Route 3A until you see signs for Cordage Commerce Center on your left. Turn left at the light at the entrance to Cordage Park.

(See below for directions once inside the park)

**From Cape Cod:**

Route 3 North to Exit 6. Right at the end of the exit ramp onto Route 44 East. At next set of lights, turn left onto Route 3A North. Travel approximately 2 miles until you see signs for Cordage Commerce Center. Turn Right at the light at the entrance to Cordage Park. (See below for directions once inside the park)

**From Points West:**

Route 495 to Exit 6 (Route 44 East/Middleboro). Follow Route 44 East for approximately 20 miles. Take exit toward Route 80 (Cherry St./N. Plymouth). Turn left onto Commerce Way. Turn right onto Nicks Rock Road (becomes Cherry St.). Turn left onto Court St./Route 3A North. Turn right at the light at the entrance to Cordage Park. (See below for directions once inside the park)

**Once Inside the Park:**

Take your first right and follow the access road toward Building #36 (gray brick building). Travel around the building and down the hill, Building #36 will be on your left and parking on your right. You will see a black canopy marking the entrance to the Commerce Center. We are located at the top of the stairs on the second floor.

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