

HELPING TURN YOUR MONEY INTO SOUND INVESTMENTS

WHY US

OUR TEAM

WHO WE ARE

At Lipe & Dalton, both founders hold the prestigious Chartered Financial Analyst (CFA) designation which is awarded only by the internationally respected CFA Institute. CFA charter-holders are held to some of the highest ethical and fiduciary standards in the investment industry.

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**WILLARD C. LIPE,
III, CFA**

Mr. Lipe is the co-founder of Lipe & Dalton. Mr. Lipe earned his BS in Environmental Engineering from SUNY College of Environmental Science and Forestry, and his MBA from University of Rochester. Bill is a CFA Charterholder.



**PATRICK M.
DALTON, CFA**

Co-Founder Mr. Dalton earned his BS in Electrical Engineering from the University of Vermont, and his MBA from Syracuse University. Patrick is a CFA Charterholder.

Schedule an appointment

Send an email to Bill Lipe

Send an email to Pat Dalton



contact@lipeanddalton.com



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