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A BALANCED APPROACH TO ACHIEVING YOUR FINANCIAL GOALS

Family Wealth Management ►

Preserve // Enrich // Adapt

Retirement Plan Services ►

Guidance // Counsel // Impact

About Us

At Aurum, our mission is to provide you with a proper mix of resources, expertise and technology to help you become an effective CEO of your money.

Our services are focused on both family wealth management and corporate retirement plans. For families, we start with understanding your needs and building a plan that will serve as a blueprint for the optimal investment strategies. For corporate retirement plans, we provide companies with customized retirement plan solutions that mitigate fiduciary risk, reduce costs and minimize administrative burdens. Above all, we strive to provide great value and guidance to employees.

[MEET OUR TEAM ►](#)

Aurum is a strategically aligned partner of Skoda Minotti, a top 100 national business advisory firm dedicated to helping privately held businesses, public companies and individuals build strategies, grow and achieve financial success. The firm's unique family of services includes accounting, tax, financial, information technology, professional staffing, risk, marketing, valuation and litigation and wealth management.



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