



INNOVATIVE WEALTH MANAGEMENT

Satovsky Asset Management (SAM) is a New York City based boutique independent registered investment advisory (RIA) firm. We serve the financial needs of sophisticated multi-generational families, business owners, endowments, pensions, 401(k) plans, charitable institutions

Satovsky Asset Mana...



and individuals around the world. Our holistic, personal approach to wealth management considers your entire financial picture and enables us to create an investment structure aligned to your unique set of goals. We embrace solutions leveraging the latest in digital technology as well as a more traditional investment experience.

OUR
STORY

SAM
DIGITAL

GET IN TOUCH

OUR UNIQUE APPROACH



ALIGNMENT

As an independent investment advisory firm, our main priority is to align our interests with those of our clients. We take a long-term approach to investing with the goal of achieving optimal returns over time.



CURATED PORTFOLIOS

We believe in providing truly personal financial advice tailored to each client's established goals. Asking the right questions enables us to clearly identify your true vision.



MINDFUL STRATEGIES

We are mindful of the gap between investor and investment returns known as the behavior gap. We help our clients focus on what is really important – meeting financial goals while avoiding common pitfalls.

HOW WE HELP

LATEST POSTS

Jonathan Satovsky - 06/27/2019: ...



SAM Video Blog June 27, 2019

Jonathan M. Satovsky discusses the benefit of people reflecting on their behavior and balancing the here and now with the later, for an abundant future.

SAM Video Blog May 14, 2019

In honor of Mother's Day, Jonathan discusses women and their role in investing in our culture. He also explains how patience in current market conditions will lead to investor

SAM Video Blog April 12, 2019

Jonathan discusses taxes, 1st Quarter market performance, and the persistency of factors in the markets. He further explains how owning a globally diversified portfolio tilting toward small, cheap, and

SAM Video Blog March 14, 2019

Jonathan discusses mindfulness, March Madness and the math of money. He explains how awareness, discipline and collaboration are essential to building wealth over time.

FEATURED ON



Forbes



Bloomberg



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