D'Annunzio CONSULTING GROUP

Welcome to D'Annunzio Consulting

D'Annunzio Consulting Group, LLC consults to a select group of national clients in the area of custom investment portfolio design, implementation, and measurement. We specialize in guiding investors through global choices for each trust, family member, private foundation and other legal entity. No one client has the same resources, experiences, preferences, tax circumstances, interests, goals or knowledge as another, so we build unique portfolios for each. Our consulting approach is the standard for institutions such as billion dollar plus pension plans but we offer it to smaller institutions and families as well.

Consulting Process

Professionals work with integrity in all aspects of the relationship, starting with the advice given. When we are hired we review current holdings compared to our client's goals, risk tolerance, preferences and tax circumstances. This is done in light of current economic and market environments around the world. Opportunities to improve the portfolio are identified and

discussed with our client. If our client's goals are not in line with what can reasonably be achieved within the risk profile desired, we counsel our client to either adjust their goal or accept a higher amount of risk – and explain the consequences should the higher risk not be rewarded over their time horizon.

Our clients are included in the portfolio building and management process each step of the way. This means they learn a lot more about financial markets, securities, economics, valuation methods, risk and asset classes than they might have learned under a more commercial mass-market approach backdropped with "model portfolios". We limit the number of client relationships to keep our services attentive to the uniqueness of each client.

Our Services

D'Annunzio Consulting Group, LLC offers non-discretionary investment advice (consulting services) to a select group of clients which include primarily high net-worth families, trusts, retirement assets and private foundations. Our fees are quoted based on the services desired and the complexity of the decision-making, asset structure, reporting requirements and number of legal entities rather than on asset size alone. Thus we often are a more economical choice for larger asset clients.

Meet Our Team

Holly D'Annunzio, Principal, is a Chartered Financial Analyst with over 35 years' experience and leads the consulting practice. Her strengths include understanding client situations and applying the diverse financial opportunity set toward a proper solution. Assisting her in this process is a team of dedicated consultants, analysts and staff who have served clients together for over 15 years. Our client relationships span decades while our knowledge is refreshed daily though the constantly changing global environment.

D'Annunzio CONSULTING GROUP

621 Pacific Avenue
Suite 216
Tacoma, WA 98402

D'Annunzio Consulting Group LLC

Office: (253) 272-1972

Fax: (253) 274-5699

Send an Email

Check the background of your financial professional on FINRA's BrokerCheck.

Registered in the following states: California (CA), Washington (WA)