

Alterity Financial Group

Portfolio management, retirement planning and insurance services

Alterity Financial Group offers personalized services and a unique approach to growing client portfolios. With a combined 100 years of experience, we know a thing or two about the investment field. We know how the big firms tick, and know that's not always how you want your portfolio managed. Our company listens to your thoughts and concerns, and always takes them into consideration when building your portfolio. When you work with Alterity Financial, you will receive the attention of a boutique company with the knowledge and support of an investing giant. Our company boasts some of the lowest costs in the industry. Our management fees are well below most mutual funds, and our transaction costs beat out most broker-dealers. Most importantly, we have built our business and platform around transparency, with no hidden fees or costs that surprise you at the last minute.

Our Mission

Our mission is to provide the best investment services and performance possible to our clients through a hands-on approach, personalized customer care, and transparency. We believe an informed client makes the best decisions, and will guide them to the best opportunities for portfolio growth.

Our Objectives

- We approach every relationship with a client-first mentality and always keep their best interest in mind.
- We believe in a holistic approach and take a unique path to our models and client' portfolio investment selection.
- We use an analytical process involving both qualitative and fundamental analysis that delivers a unique approach to portfolio construction.
- We invest in a conservative fashion and evaluate each client's investment objectives and tolerance of risk.
- We strive to reduce fees and expensive management costs that cut into returns and frustrate investors.
- We provide professional insight and education for clients on all levels of experience, from investing beginners to seasoned experts.

Our Name

Previously known as Maine Asset Management and Florida Asset Management, Alterity Financial Group was created to reflect the growth of our company as our client reach expands across the nation. Charles Schwab is our primary custodian which means customers receive the specialized treatment of a boutique investment company with the account protections of a major Wall Street firm.