As an investment advisory firm and a fiduciary, The Waterford Group effectively brings people, process and performance together to benefit our business and individual clients with our expertise in retirement plans and individual investment management. We strive to understand each client's unique needs and achieve results that deliver financial peace of mind.

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We're excited to provide our services as business owners serving business owners. Focusing on sound, independent, proven investment management solutions and strategies, we're dedicated to putting your best interests first, always. We are all about personalized attention, answers and advice, and invite you to discover the unique advantages we offer at The Waterford Group.

- Brian P. Costello, AIF®, *CEO*
- Michael J. Merriman, AIF®, *Managing Director*
- Mary K. O'Brian, AIF®, *President*

We help businesses provide the optimal retirement plan to their employees. We work closely with you to manage the entire fiduciary process around your 401(k), profit sharing or defined benefit plan – from the investment selection, monitoring and due diligence to employee communication, and beyond.

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As independent, fee-based investment advisors, we are always on your side of the table – an approach that eliminates conflicts of interest. Our goal is to exceed your expectations to better manage your personal wealth and future security.

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Rochester Business Journal article on TWG $100 Million Target.