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A Different Approach To Wealth Management

In the world of Investing Information is plentiful.

Strategic insight is rare & Rigorous.

Professional intelligence Is Invaluable.

Strategic Wealth Partners, Inc. is an independent, client-centered, fee-based asset management firm in Rochester, New York serving individual investors and institutional clients [⤴](#)

nationwide. We take a personal approach, building custom investment portfolios designed to generate multiple income streams and produce market-like returns with less than market risk.



Our Clients are Partners

We regard our clients as partners, investing alongside them and protecting our mutual capital.



Our Objectives are Clear

Our primary objective is to help protect you from identifiable risks and to preserve the wealth that you have accumulated. Our secondary objective is to help create portfolio appreciation through strategic growth and income.



Our Focus is You

Our professional focus is to help you achieve and maintain your personal financial security.



We are Active Managers

Opportunistically applying independent research and careful analysis in a strategic fashion, re-evaluating each portfolio, the market and the macro-economic environment each day in a disciplined effort to optimally balance risk and reward.



Your Interests are Our Interests

Our practice is built on a partnership model where the client and the portfolio team each bring real value to the relationship. Your interests are our interests; they are clearly and consistently aligned.

For our most recent commentary, visit our [resources page](#).



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TD Ameritrade

Assetbook



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