





Why Choose PPS to Manage Your Wealth?

Analysis, Advice, Access

The Keys to Wealth Management Success



Insightful ANALYSIS

“We conduct our own analysis of markets and securities to ensure that your portfolio matches your risk/reward goals.”

— Carlton Savoye, CFA
Partner, Investments / Wealth Advisory

Experience and insight:

- Focus on reducing portfolio risk
- Spend time to fully understand your financial situation

- Conduct in-depth research on capital markets and individual securities

➤ *How you benefit:*

- *Better understand the risk/reward tradeoff decisions that will produce your desired financial outcome*
- *Increase the likelihood of achieving your lifestyle and legacy*
- *Peace of mind that your portfolio is being managed prudently*

Customized ADVICE

“We provide customized advice and investment solutions that address your individual circumstances to help secure your financial future.”

— Alan M. Moucha, CFA
Partner, Investments / Wealth Advisory



Focused on your goals:

- Taking the time to learn what matters most to you
- Individually managed portfolios reflect only your goals and objectives
- PPSG acts as a fiduciary; your interests always come first

➤ *How you benefit:*

- *Objective advice and recommendations are the basis of your PPS relationship*
- *Your portfolio is personalized to your specific situation and needs*
- *Consistent and competitive risk adjusted returns relative to your agreed-upon investment policy statement*



Timely ACCESS

“Whether your request is simple or complex, we listen carefully and provide timely and comprehensive follow-up.”

— John J. Capodici
Partner, Investments / Wealth Advisory

High-quality service:

- Direct access to your portfolio manager
- We explain our thinking on your portfolio’s activity
- Phone calls and e-mails are returned promptly
- Professional staff enhances the client experience

➤ *How you benefit:*

- *Timely and accurate reports and communications*
- *Always have a good understanding of the risk/reward profile of your portfolio*
- *Develop a trusted, long-term relationship with your advisor*



PPS is an Independent, Boutique-Sized Firm

“We are 100% employee-owned and managed, which allows us to be 100% client focused.”

— Suzanne Twitchell
Partner, Chief Operating Officer

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Disclosures

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