OUR FIRM

Parkside Investments, LLC is an SEC-registered investment advisor, founded in 2017. We are an independent, boutique investment management firm providing individualized investment advice and we are committed to personal relationships, communications and service for our clients.

Our typical client is an individual, a family, or often multiple generations who seek an investment advisor dedicated to a long-term investment philosophy. Armed with decades of cumulative investing experience, independent research, and practical capability, we customize an investment strategy to embody a client's defined goals and objectives, while balancing risk and reward.

We collaborate with our clients' estate and tax experts to help ensure comprehensive wealth planning. We appreciate the complexities of managing multi-generational wealth because over 60% of our Assets Under Management (AUM) reflects multi-generational management of two or three generations.

As part of our multi-generational perspective, we are pleased to mentor young or less experienced family members to expand their financial literacy and prepare them to successfully transition to handling wealth. We understand that financial legacies often require trusted advice, significant preparation/administration and effective nurturing for success.

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