Pine Haven
Investment Counsel, Inc.

WELCOME TO PINE HAVEN

Stewards of your family's wealth and security

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Pine Haven is a fee-based investment counsel firm located in Fairhaven, Massachusetts. Pine Haven provides counsel, planning and investment management to a select group of clients.

We are a small independent firm investing for your life and for your heirs.

First, we take the time to develop a thorough understanding of your goals and dreams, and then we work together to enact a plan. Through this process Pine Haven provides you peace of mind and a roadmap to financial security. Pine Haven believes that long-term investment success does not come by accident, but that it is easy to achieve following a disciplined investment and savings program.

Paige Johnson Roth founded the firm in 1999 and moved from Portland, Oregon in 2001 to be nearer to her family in New England. She is assisted by Maureen (Hall) Kelly. We take pleasure in helping people attain financial independence in a socially responsible way.

As the name Pine Haven conveys, theirs is a company that provides a place for such growth, a haven in which the seeds of wealth can be well-tended and protected.

As a fiduciary, we are held to the highest ethical standards. And as an independent Registered Investment Advisor we charge a fee based on the percentage of assets that are managed. In this way the fees only rise when the account balances rise, eliminating the conflict of interest inherent in commission-based compensation.

VALUE BASED INVESTING

Ever felt uncomfortable owning a company that had a stance different from your own values? Are you concerned about the sustainablility of the companies you own? Would you like to have your investments be aligned with your values?

At Pine Haven clients can work with us to have an investment portfolio that matches their values with your money. To do this we help clients identify their values and set realistic financial goals. We look to connect our clients money, values and life. As part of this process investors can develop a values based portfolio and we can setup specific screens for use. This is a individualized socially responsible portfolio.

In all of our stock selections, we consider what are called Environmental, Social and Governance factors (ESG). Consideration of ESG in investing is important to help determine the long-term viability of a company. The area of ESG investing has taken more prominence in the past few years as both investors and corporations are incorporating ESG factors in their work.

OUR TEAM

Pine Haven
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PAIGE JOHNSON ROTH
PRESIDENT

CLIENT CENTER

Our resources are for the benefit of our clients and visitors.

ADV Part 2A & ADV Part 2B April 2019

2019 Q1 Taxes & Change

2018 Q4 Pyrotechnics in the Market

2018 Q3 The Great Anticipation: Handle with Care

2018 Q2 Cake With The Neighbors

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2017 Q3 Love and Other Demons

2017 Q2 Integrity

2017 Q1 Truth is at the Beginning

How to Protect Yourself Online - Cyber Security Awareness

2017 Charitable Giving

2016 Q4 It's Not That People Don't Know

2016 Q3 Fear and Improvisation

2016 Q2 Putting Numbers in the Context of Your Life

2016 Q1 What We do in the Shadows

OUR APPROACH

At Pine Haven, we believe there are two essential parts to providing for your financial future. We have found that future successes are achieved when the two aspects work together. The two aspects are Counsel and Management.

developing a deep understanding of your goals and objectives is very important to our mutual success. During our initial conversations we work to discover your needs, concerns, current situation, goals, and thoughts on your whole financial picture. This includes discussions on goals for retirement, estate and college planning, family values, charitable giving, and other areas.

Here is some information on Paige's families approach to Counsel over the years and how it has effected her life. MyFamily

MANAGEMENT

At Pine Haven, for most clients we purchase individual equities. These individual equities are in some cases matched with mutual funds for diversification purposes. Unlike Wall Street, we purchase and hold our equities for many years - we are long term investors. We do not try to predict or time the market as history has shown this to not be a successful long term investment strategy. Most of the individual securities we own are large multinational companies - so that they are names investors are familiar with.

Here is some further information on our investing philosophy: The Predictables

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CONTACT

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