INVEST FOR A BRIGHTER FUTURE

“Compound interest is the eighth wonder of the world. He who understands it, earns it … he who doesn't … pays it.” – Albert Einstein

We are an independent, fee-only SEC-registered* investment advisory firm, with approximately $337 million in assets under management as of December 31, 2018. Our clients’ assets are held in separate, individually managed accounts. We are required by law to act as fiduciaries, which means we must always put our clients’ interest first. We take great pride in following this standard.

** Registration does not imply a certain level of skill or training*

LEARN MORE ABOUT WHAT WE DO

We take pride in placing the interests of our clients first.

INDIVIDUAL MANAGEMENT

Our portfolios are managed individually. Clients can choose one of three customizable strategies: Growth, Growth & Income, or Income.

TAX-EFFICIENT PORTFOLIOS

We take tax efficiency into consideration in managing taxable accounts. The ability to accumulate long-term gains while deferring taxes is one of the keys to successful investing.

FOCUS ON INVESTMENT SELECTION

We identify mutual funds and ETFs with strong performance to use in implementing our asset allocation, evaluating factors that include performance, volatility, and expense ratio.

SEE OUR UNIQUE ADVANTAGE

Let’s Talk

Our belief is that the best investment results are achieved when the advisor’s interests and the client’s interests are aligned. We’d love to talk and see if we’d be a good fit for your financial needs.

CONTACT US

PARKER INVESTMENT MANAGEMENT