

Successful

When experience, integrity,
and results matter most, Concorde delivers.

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founded in 1981

Our philosophy is simple. We want to get to know you in order to help you make the best financial and investment decisions possible.



Counseling

Through an introspective discovery of your objectives and priorities – short term, long term and multi-generational – we work with you to address the “where” and the “purpose” behind your accumulation, wealth preservation and investment strategy.

[Read more about Counseling](#)



Investment management

In a time of increasingly uncertain possibilities, investment portfolios, whatever the growth objectives may be, must have characteristics of resiliency, to allow the time and add the capability to take advantage of unexpected adverse market conditions and to preserve capital.

[Read more about Investment management](#)



Private Equity Investments

For clients whose structural aspects of accumulation have been addressed and the majority of assets have been deployed to be productive by generating rational “investment returns” with an imperative of capital preservation, the inclusion of a higher risk/higher return component could be considered.

[Read more about Private Equity Investment](#)

WHO WE ARE

GET TO KNOW US

Concorde is an investment management advisory firm dedicated to implementing client-specific strategies formed by extensive portfolio management experience and a proven ability to confidently judge appropriate market and advisory strategies. Our firm was created on the principle that our clients expect and deserve authentic, unbiased advice delivered in a client-centric atmosphere of trust. That's why we choose to limit the size of our client list, so as not to sacrifice the quality

of service that inspires confidence and lasting relationships.

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If you are interested in our services and would like additional information or have specific project questions.

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