

Integrity • Independence • Insight

AN INDEPENDENT INVESTMENT ADVISORY FIRM

Want to Learn More? (<https://yhb.com/who-we-are/>)

Learn More About YHB

Investments (<https://yhb.com/investments/>)

With each client, YHB develops a diversified portfolio that is individually tailored to help achieve established financial goals.



(<https://yhb.com/investments/>)

Learn More (<https://yhb.com/investments/>)

Client Services (<https://yhbia.com/client-services/>)

Each client works closely with an investment manager and a portfolio administrator who are familiar with all aspects of his or her accounts.



([https://yhbia.com/client-](https://yhbia.com/client-services/)

[Learn More \(https://yhbia.com/client-services/\)](https://yhbia.com/client-services/)

In The Community (<https://yhbia.com/in-the-community/>)

Community service not only helps neighbors but also builds camaraderie. We actively support a number of local and worldwide charities.



([https://yhbia.com/in-](https://yhbia.com/in-the-community/)

[Learn More \(https://yhbia.com/in-the-community/\)](https://yhbia.com/in-the-community/)

A Team of Trusted Professionals

Built on a strong foundation of integrity, trust, and transparency.

[Meet the Team \(https://yhbia.com/team/\)](https://yhbia.com/team/)

Who We Are

YHB Investment Advisors is an independent investment advisory firm with a team of highly experienced portfolio managers who work collaboratively to develop and manage customized portfolios for hundreds of clients. Our customized portfolios consist primarily of stocks and bonds that are carefully selected through a rigorous analytical process. We believe we provide the breadth of experience of a large firm but are small enough to give customized attention and service to our clients. We develop holistic relationships with our clients and their families so that we understand their personal and financial objectives.

Our Team (<https://yhb.com/team/>) | In the Community (<https://yhb.com/in-the-community/>)



Years of Longevity

Assets Under Management

Customized Portfolio Management

With each client, YHB develops a diversified portfolio that is individually tailored to help achieve established financial goals.

Client relationships begin with a complete review of each client's current situation and goals. We help our clients establish clear priorities and realistic investment objectives through a detailed discussion of the client's expectations, risk tolerance, income needs and special requirements. We then design an investment policy that creates an efficient combination of risks and expected returns. This information, documented as the "Investment Policy Guidelines" for each client, becomes the blueprint for all subsequent investing decisions.



Market Outlook

YHB prepares quarterly newsletters that provide our current investment thinking. We present a broad overview of the economy, interest rates, equity markets, and review developing trends in the marketplace.

[Latest Market Outlook \(/market-outlook/?latest=1\)](/market-outlook/?latest=1)

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