

Investment consulting that goes above and beyond

Others say it; we live it.

Scroll to learn about five ways we're different.



Team

n, fully d relationships

o-consistency and anti-complacency. Your
iced, multi-functional team will work for you
e sitting right outside your office. Further,
u see is what you get. The people who lead
are among those on your service team—
our client, you have direct access to them
er you want. In our world, tenure and long-
tnerships are positive things.

at Our Team (/Our-People)

aptability to individual client needs

Our clients come from many different spaces and have a wide variety of objectives and needs. That's why we build a custom portfolio for every single one—designed to align their capital with their individual goals. We will work closely with you to create, implement, and monitor investment programs and asset allocation strategies that suit your unique needs.

[View Client Types \(/Clients\)](#)



Services

Integrity at all times

Integrity is at the heart of how we do business. Embedded in our operating philosophy, consistent work, investment process, monitoring—even our fees. In fact, we offer a full-service model so you won't ever be surprised by extra service and other fees because they'll never show up on our invoice. This model frees us to do what we feel it takes to do right by you—like a partner.

Services (/Services)

Merely independent investing

Prime Buchholz has been fully independent since its inception in 1988. That means that we have no outside business relationships that influence the way we serve you, we don't accept any compensation from managers, and we won't try to recommend products that don't make sense for your needs. We operate in this way not because we're required to but because we want you to rest assured that we are acting with your best interests in mind.

[More On Our Approach \(/About-Us\)](#)



steadfast pursuit of greatness — yond just the numbers

We work with community foundations, hospitals, schools, pensions, faith-based organizations, endowments, and others, so we know a 10-year compound return is not just a number. To our clients, asset protection and growth represent more academic scholarships, improved health care facilities, community services, bright retirements for hardworking people, and so much more.

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Good to know

Updates from Prime Buchholz

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May 2019 Monthly Market Review

After a strong start to 2019, market sentiment shifted dramatically in May as vi..

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[\(https://www.primebuchholz.com/2019/06/17/may-2019-monthly-market-review/\)](https://www.primebuchholz.com/2019/06/17/may-2019-monthly-market-review/)

April 2019 Monthly Market Review

Risk aversion declined further in April, helping equities continue to deliver br..

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[\(https://www.primebuchholz.com/2019/05/16/april-2019-monthly-market-review/\)](https://www.primebuchholz.com/2019/05/16/april-2019-monthly-market-review/)

March 2019 Monthly Market Review

Equities continued to post broad gains in March as the Fed's dovish tilt becam..

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[\(https://www.primebuchholz.com/2019/04/10/march-2019-monthly-market-review/\)](https://www.primebuchholz.com/2019/04/10/march-2019-monthly-market-review/)

February 2019 Monthly Market Review

Risk assets delivered strong performance in February. Sentiment remained posit..

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[\(https://www.primebuchholz.com/2019/03/15/february-2019-monthly-market-review/\)](https://www.primebuchholz.com/2019/03/15/february-2019-monthly-market-review/)

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