



About Us

Asset Management Consulting Firm

We offer a full array of asset management services to corporate retirement plans, endowments, not-for-profit institutions, and family offices.

Registered Non-discretionary Investment Advisor

We are registered as a non-discretionary investment advisor with the SEC .

Independent Investment Advisor

We are not affiliated with any money manager, custodian, recordkeeper, or brokerage entity.

Chartwell's Philosophy

We strive to provide thorough and customized evaluations of our clients' issues, delivered in a manner that is focused and clear.

We use our independence to avoid all conflicts of interest that could potentially undermine any client benefits.

We are in a relationship business—we do not compromise the quality of our service or our advice.

We charge competitive fees that reflect the experience and expertise delivered.

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