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About Us

Bolter & Company is an independent, SEC-registered investment adviser, founded by Gene Bolter, and entrusted by high net worth individuals and families to manage their securities portfolios. Client assets are held at an independent, third party custodian, Fidelity Investments. Bolter & Company manages long-only, discretionary portfolios consisting primarily of individual equity holdings of high quality U.S. stocks. Bonds and money market instruments are also included as appropriate. Portfolios are managed individually within the guidelines, risk tolerances and objectives established with each client. Our clients understand the need for trusted and experienced portfolio management; several of whom have been with Gene for over 25 years.

We are deeply committed to the timely management of risk in pursuit of the appropriate investment goals of our clients. We strive to be bold when market conditions allow and protective when required. We employ an investment process that is research and technically-driven, but also takes into account current macroeconomic and financial conditions. Our investment process focuses, for the most part, on a small number of large established U.S. companies that provide continuing organic revenue and dividend growth and whose stocks maintain positive technical chart patterns.

Gene has over 45 years of investment experience including twenty years with The First Boston Corporation where he was a member of its Equity Investment Policy and Employee's Profit Sharing Committees. He has overseen and managed institutional and individual securities portfolios throughout his career at various Wall Street firms.

We seek trusting, long-term relationships with our clients. All relationships are held in the strictest of confidence and are private. Client investment records are maintained on our portfolio management system providing access to daily account performance, historical activity, and tax information.

To learn more about Bolter & Company, contact Victoria McCann at (516) 873-8650. Client references are available.

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