



DELTA ASSET (✓)
MANAGEMENT

 (<https://www.linkedin.com/company/delta-asset-management-llc>)

Client Login (<https://login.orionadvisor.com/login.html?g=d09d7ca0-1cab-4b22-8af9-9672a265deaf>)

ACTIVE PATIENCE

Our commitment is to provide sound, professional investment management in a cost effective manner.

Delta Asset Management was founded in late 1989 and has since grown to a team of 9 professionals and assets under management in excess of \$1 Billion.

Delta is a Registered Investment Adviser focusing on discretionary management of common stock and fixed income portfolios for corporations, individuals, retirement plans, pensions, and foundations.



Services

Delta's core service is asset management. Through extensive in-house research our team selects securities that fit our value oriented philosophy. Client portfolios range from all equity, all fixed income, and balanced accounts. Portfolio structure is tailored to client's specific needs using individual publicly traded assets.



Professional Staff

Delta's team has a long and successful history in the investment management business and our principals have an average of 27 years of experience in the money management industry. Principals' roles include portfolio management and investment research. In an effort to continue to meet clients' needs, Delta now employs two Chartered Financial Analysts® and two Certified Financial Planners™.



Record

Delta and predecessor firms have delivered competitive performance with a clearly defined, consistently implemented investment philosophy. Clients include individuals, trusts, retirement plans, endowments, and foundations and many clients have been with Delta since inception of the firm.

Why Delta?

If you are looking for a simpler approach to managing your investments...

If you are concerned that you are paying too much in fees and commissions...

If you are tired of chasing returns and are looking for a more consistent, long term approach...

If asset management seems to be an afterthought of your current financial advisor...

Then you are likely a good fit for our approach. Continue reading to find out how and why we are different.

Sign up for our quarterly newsletter

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Memphis, TN 38117

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 Tel: 901-767-4791 (tel:901-767-4791)  Toll Free: 800-234-4791 (tel:800-234-4791)

 Fax: 901-767-1224 (901-767-1224)  website@deltaasset.com (mailto:delta@deltaasset.com)

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