



Our Purpose

Our purpose at Green Square Capital Advisors is to provide financial peace of mind to wealthy families, foundations and institutions.



GREEN SQUARE CAPITAL ADVISORS

Who We Are



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At Green Square, our core values, brand promise and investment advisors are the biggest drivers of our success. An investment advisory team consisting of senior investment professionals works with every client of our firm. This team-based, boutique approach ensures that our clients receive the highest degree of personal service.

**WE ARE THE ENTREPRENEUR'S WEALTH
ADVISOR.**

What we Do



Our Services

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Green Square Wealth Advisory
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Accredited investors receive our sophisticated asset management and investment process. Clients also receive web-based, on-demand, comprehensive reporting, year-end tax reporting, portal access for secure document retrieval, investment commentary and portfolio rebalancing.

Green Square Family Office

Green Square offers Family Office services. Family Office clients have more complex needs associated with customized reporting, alternative investment due diligence and coordination, asset and liability optimization, and coordination amongst professional service providers such as accounting, legal and insurance. For Family Office clients, Green Square acts as an outsourced chief financial officer.

Green Square Institutional Asset Management

We provide investment solutions tailored to meet the specific needs and objectives of 401Ks, foundations, endowments, public entities, and corporations. We deliver our pragmatic investment process and work together with our institutions to fulfill their fiduciary responsibilities through risk management, investment policy statement construction & maintenance, board education, and customized reporting and communication.

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