MENU

Income & Asset Advisory, Inc.

Registered Investment Advisor

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Our Mission:

The mission of Income & Asset Advisory is to provide Investment and Financial advice to our clients in a manner that always puts their needs first and foremost. We strive to earn a reasonable return on invested capital consistent with the primary consideration of preservation of that capital and the secondary consideration of the rate of return.

Our Firm:

Income & Asset Advisory is an independent Registered Investment Advisory firm founded in 1986. We are a small firm with a diverse client base of professionals, teachers, businesses, young parents, empty nesters and retirees. Our advisors encourage and support a strong sense of teamwork. Their expertise and vast financial knowledge coupled with the support of our administrative staff provide you with seamless continuity and service.

We build a financial foundation for each client considering their individual needs, financial condition and goals and then help each client plan for his or her current stage in life as well as future family plans and wealth protection. Our team faces every task with integrity and honesty. The clients' interests are always paramount.

Our Goal:

We hope your visit to our site will help introduce you to the opportunities and potential rewards that are available when you take a proactive approach to your personal financial situation. We have created this website to help you gain a better understanding of the financial concepts behind insurance, investing, retirement, estate planning and wealth preservation. We hope that these resources empower you to become a more informed investor—one able to pursue financial goals knowledgeably while having the trust to see the value of working with skilled professionals.

We welcome your questions and comments. Please feel free to contact us at 914-273-6800 or by e-mail (mailto:Bryna@TheAdvisory.com?subject=Information).
