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WATEROAK AT A GLANCE

- Assets Under Management: ~\$2 billion
- Location: Headquarters in Winter Park, FL
- Compensation Structure: Fee-Only
- Human Capital: 13 full-time professionals
- Designations/Advanced Degrees of Staff: CFA, CFP®, CIPM, MBA
- Ownership: 100% employee owned

WHO WE ARE

Meet our team of experts

- CFA, Chartered Financial Analyst
- CFP®, Certified Financial Planner
- CIPM, Certificate in Investment Performance Measurement
- MBA, Master of Business Administration

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HOW TO HIRE AN ADVISOR

Learn which questions are most important to ask before choosing a financial advisor.

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ESSENTIAL PLANNING

We provide **financial planning as an additional service** for our wealth management clients, delivered by experts.

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Expert financial advice delivered with personalized service.

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QUANT+ PORTFOLIO SERIES™

Academic advances once reserved only for the largest portfolios in the country.

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TOOLS FOR CLIENTS

Do you know your risk number?

We offer a valuable Tool for Clients that will calculate a personalized risk number for you.

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BARRON'S Top 100 (2018)
FINANCIAL TIMES 300 (2018)
FORBES Top 100 (2018)

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WHAT WE DO
ESSENTIAL PLANNING

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HOW WE THINK
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