The Bulls and Bears do Battle

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What matters most to you?

That's where your story begins at LionsBridge Wealth Management. We create and implement wealth enhancing strategies based on your vision of happily ever after with plans that are as independent and unique as you are.

Our Mission

LionsBridge Wealth Management is focused on delivering every possible advantage to our clients, from protecting their families, limiting taxes, protecting capital to enjoying sustainable growth. Underpinning our approach is our core commitment to putting your interests first and helping you to succeed.

We strive to deliver unbiased and independent advice, while building client loyalty through trust, integrity and unsurpassed service.

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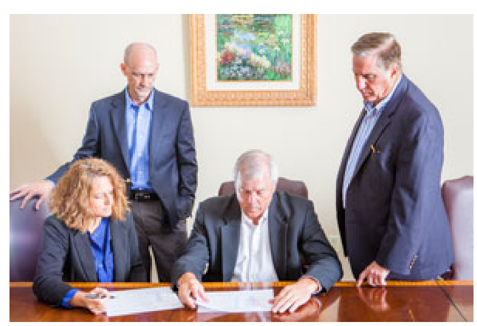
- **Personalized Attention**
- **Fiduciary Responsibility**
- **Conflict Free, Fee-only advice**
- **Open-architecture investment platform**
- **Fully independent**
- **Low Fees**
- **Tax-sensitive Investing**

The only measure of our success is Your Success!!



Experience

Expertise

- A team with a unique background gained while working at some of the top financial institutions in the nation
- Over **100** years of combined experience working specifically with affluent individuals
- Experts in the construction of customized portfolios using traditional and alternative investments, trust, estate and financial planning

Our professionals hold the highly respected

- Chartered Financial Analyst **(CFA),**
- Chartered Financial Planner **(CFP)**
- Certified Investment Management Analyst **(CIMA)**

They work well together and with a firm policy of a low client-to-advisor ratio, it allows for personalized service and better investment oversight

Trust & Integrity

With an intimate knowledge and thorough examination of the relevant aspects of your financial affairs, we will collaborate with you to achieve your long-term goals.

As strategists, we make it our business to understand our client's – *value system, life goals and financial life.* We accomplish this through targeted, shorter-term objectives and personalized strategies to minimize risk and maximize wealth.

We are committed to delivering world-class **wealth management** and **financial planning** within a conflict-free environment that puts our clients' needs first.

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Our Process
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