ROCKINGSTONE ADVISORS LLC

Sophisticated

We provide investment strategies that go beyond mutual funds and municipals, providing high net worth individuals and families with portfolio management across multiple asset classes with an emphasis on capitalizing on mis-priced assets, then mis-priced sectors, then mis-priced securities in an attempt to generate positive risk-adjusted returns.

Based in New York City, Rockingstone Advisors LLC is a boutique financial advisory firm providing asset management and corporate advisory services to clients in the United States and United Kingdom.

As a Registered Investment Advisor, the firm's Asset Management division provides multi-asset investment solutions to individuals, families and small institutions.

The firm's Corporate Advisory division provides investment banking services (M&A advisory, capital structure analysis, equity-offering support and investor communications improvement) to public and private companies in the United States and the United Kingdom.

Rockingstone Advisors was founded by Brandt Sakakeeny. With more than 20 years' experience, Brandt has established a reputation as a thought-leader on Wall Street with a strong following among institutional investors and the management of publicly-traded companies. Eric Katzman, CFA, joined Rockingstone Advisors in September 2016 as Co-Chief Investment Officer.

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(/our-services/portfolio-management/investment-process)

(/our-services/portfolio-management/global-scope)

(/our-services/portfolio-management/peace-of-mind)

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