



OUR OFFERING

ADVISER
PLATFORM
(/ADVISER-
SERVICES)

A HOLISTIC AND
TURNKEY PLATFORM
FOR WEALTH
MANAGERS AND
FINANCIAL PLANNERS,
BUILT AROUND
TECHNOLOGY,
SERVICE AND OUR
DISCIPLINED
INVESTMENT
PHILOSOPHY

INSTITUTIONAL
CONSULTING
(/INSTITUTIONS)

SPECIALIZED ASSET
MANAGEMENT AND
CONSULTING
SERVICES FOR
PENSIONS,
ENDOWMENTS,
FOUNDATIONS AND
TRUSTS

FAMILY OFFICE
(/FAMILY-OFFICE)

A MULTI-FAMILY
OFFICE DESIGNED TO
BENEFIT ITS CLIENTS
WITH INDEPENDENCE,
FLEXIBILITY,
EFFICIENCY AND
OBJECTIVITY

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656 E. SWEDESFORD RD, SUITE 301, WAYNE, PA 19087 484.580.2277

[DISCLAIMER \(/disclaimer\)](#)