

## WHO WE ARE

Winfield Associates, Inc. is an independently owned investment management and private wealth advisory firm with an experienced, stable investment team. We serve clients nationwide. Our engagements are fee-only, and our advice is customized to meet your goals.

### HEADQUARTERS

700 W. St. Clair Avenue, Suite 404  
Cleveland, OH 44113  
toll free: **888.322.2575**

## WHAT WE DO

- Customized Investment Portfolios
- Private Wealth Advisory Services

## WHEN TO WORK WITH WINFIELD

- Private Individual Investors
- Endowments and Foundations
- Business Owners
- Business Professionals
- Retirees

### SAN DIEGO

phone: **858.324.6488**

## CONTACT US

Toll Free: **888.322.2575**

Local: **216.241.2575**

Fax: **216.241.4774**

### HEADQUARTERS

700 West St. Clair Avenue, Suite 404  
Cleveland, OH 44113