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## *Investment Advisory Services*

Independent, objective investment advice focused on asset allocation and portfolio construction, tailored to our clients' objectives, risk tolerance and constraints.

## *Discretionary Investment Management*

Dynamic and diversified portfolios designed in accordance with our clients' objectives, risk tolerance and constraints; combining equities, mutual funds and exchange-traded funds.

## *Fully Customized & Bespoke Solutions*

Highly customized portfolios and engagements to address specific client requests. Portfolios managed on either an advisory (non-discretionary) or discretionary basis.



*Philosophy*

*Services*

*Client Service Process*

*About Wainwright*

*Contact*

- Learn about you, your family, your organization and what matters most
- Create solutions designed around your unique situation
- Review where you are now and identify gaps in where you want to be
- Utilize a disciplined, diversified approach to portfolio construction
- Monitor. Educate. Communicate.

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