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# Riverplace Capital Wealth Management

## Investment Experience

**Riverplace Capital** is among the top wealth management firms based in Jacksonville, Florida. With a combined **100 years** of seasoned financial and investment **experience**, we have been serving clients both locally and nationwide for more than 20 years. Our singular focus is to help **you** achieve your financial goals.

## Registered Investment Advisor (RIA)

We have the distinction of being registered with the **Securities and Exchange Commission (SEC)** as a **Registered Investment Advisor (RIA)**. To meet this standard, we actively manage more than \$120 million in assets annually, and serve as a fiduciary advisors to our clients.

[Learn More](#)

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## Fiduciary

We are committed to doing what is right for you, which is why we have chosen to be a fiduciary. As a fiduciary, **Riverplace Capital** is bound by law to act in the best interest of our clients. Unlike banks or brokerages, **Riverplace Capital is not paid commissions and we do not sell investment, insurance or financial products**. This avoids conflict of interest. Instead, we earn income based on your success. When you do well, we do well.

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### PURE WEALTH MANAGEMENT

We are money managers in the truest sense. We do not hire other firms; we actually manage the assets! Riverplace Capital clients benefit from local, proven, hands-on money managers while receiving the added protection of a national third-party custodian.

[Learn More](#)

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### TAX PROTECTION

**Riverplace Capital** is adept at developing tailored tax protection for your business and retirement planning. Unlike many firms, we select individual securities that are more tax efficient than many financial products. We also plan the timing for buying and selling of those investments to best meet your tax needs.

[Learn More](#)

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### FINANCIAL PERFORMANCE

We are performance driven and have the track record to prove it. With a disciplined approach to investing, we have created our own investment strategies. Our **Investment Team** meets regularly to review, monitor and adjust individual portfolios based on shifts in the stock market. At **Riverplace Capital** we hold ourselves to high performance standards and frequently meet or outperform industry benchmarks .

[View Results](#)

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### BUSINESS EXPERTISE

As a small business owner and trusted financial advisor, we are prepared to help you meet your business objectives. **Riverplace Capital**, along with our extensive network of business partners, offers comprehensive services including business valuation, business credit and cash flow analysis, pension and profit-sharing plans, business succession planning and business preparation for sale.

[Learn More](#)

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