

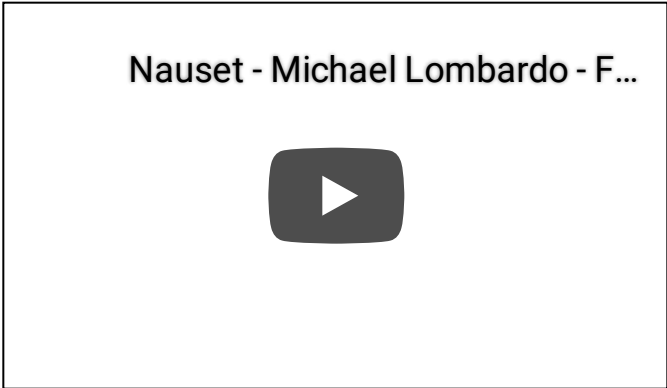
We build a wealth management relationship around your unique needs.

The complexities of your financial life require a customized approach. We assess your unique situation, build a wealth management plan, then actively manage your portfolio with our Managed Risk Asset Allocation strategy. Our rigor and depth of wealth advisory experience help you meet your goals.



Why Work with Nauset?

Are you looking for an advisor who will embrace your specific, complex financial situation? We have decades of experience tackling complex investment and financial scenarios. Tailoring customized financial plans, actively managing investments, and advising on difficult financial questions is what we do.



Founder Michael Lombardo discusses Nauset.

Nauset Profile

- SEC Registered Investment Advisor
- Founded in 2000
- \$170 million under management
- Independent, fee-only service
- Primary clients - families and individuals
- Fiduciary in all client relationships

Our wealth service integrates ongoing financial planning and investment management.



About the Partners



Michael Lombardo
PRESIDENT

Michael has over 20 years experience in the financial services industry as an investment manager, consultant and marketing manager. He is responsible for investment policy and portfolio management as well as financial planning activities.



David Bauer
PRINCIPAL

David develops holistic wealth management and retirement programs for clients with a particular expertise in meeting the needs of financial services professionals. He is a member of the firm's investment committee.

Nauset Insights Highlights



Nauset Market View – Quick Bites

PUBLISHED MAY 21, 2019

Here are the topline market views from our recent quarterly Investment Committee meeting: Volatility in financial markets will continue The US-China trade war will be...

Featured Market Commentary

QUARTERLY MARKET PERFORMANCE RECAP

A recent inversion of the bond yield curve has stoked concerns that a recession is near. Are these fears justified? Read our most recent Market Commentary...

