

# Helping You Achieve Your Vision of Financial Success

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## Fee-Only Fiduciaries

Our financial advisors do not use pushy sales tactics or earn commissions – we just want you to succeed.

**[READ MORE \(HTTPS://WWW.PATRIOTINVESTMENT.COM/PHILOSOPHY/#ADVISORS\)](https://www.patriotinvestment.com/philosophy/#advisors)**



## Financial Planning

We'll identify your priorities, develop a strategy, get you started, and help you stay on track towards your goals.

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## Investment Management

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**([HTTPS://WWW.PATRIOTINVESTMENT.COM/PHILOSOPHY/#STRATEGY](https://www.patriotinvestment.com/philosophy/#strategy))**



## Why Patriot Investment Management?

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Unbiased, independent advice on achieving your personal financial success is what you can expect from Patriot Investment Management. We create everything from scratch for you and your goals, so you can feel confident that we're working for you and your future plans.

A solid financial plan should bring you peace of mind – and that's what we strive for at Patriot. No forceful sales scheming, no making due with a plan that almost fits your needs, and no stress. Just a customized strategy that brings you closer to your financial goals each day.

**MEET THE TEAM**  
**([HTTPS://WWW.PATRIOTINVESTMENT.COM/TE](https://www.patriotinvestment.com/te))**

## Let's Make It Happen

A conversation is the first step towards clarity in all your goals – and financial planning is no different. Get to know us as we learn about your goals, and we will work together to create the financial plan that fits your definition of success.

FIRST

LAST

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# Our Insights



FT 300 Ranking June 2019



## Patriot Named To 2019 FT 300 For Top RIAs (https://www.patriot2019-financial-times-300/)

Patriot Investment Management Group is pleased to announce that we have been named in the 2019 edition of the Financial Times 300 Top Registered Investment Advisers. The list recognizes the top 300 independent Registered Investment Adviser (RIA) firms in the nation. The criteria for selection include: assets under management (AUM), AUM growth rate, years in existence, [...]

**[READ FULL POST \(HTTPS://WWW.PATRIOT2019-FINANCIAL-TIMES-300/\)](https://www.patriot2019-financial-times-300/)**

## 2019 Q2 Market Commentary (https://www.patriot-q2-markets/)

Markets Continue to Set Records in the Second Quarter of 2019 Stock markets in the U.S. and mostly around the globe turned in a good second quarter, which when combined with a good first quarter, created fantastic YTD returns for investors. In fact, the returns were historic, especially for the last month of the second [...]

**[READ FULL POST \(HTTPS://WWW.PATRIOTQ2-MARKETS/\)](https://www.patriot-q2-markets/)**

## A Nike-Inspired Checklist To Help You Plan (https://www.patriot-do-it-nike/)

Whether you're a millennial, baby boomer, Gen X or Gen Z, you face financial questions besides just getting through to next payday. Here's a simple two-step Nike-inspired checklist to help you start planning with your money. Just Plan Critical for long-term success, your financial plan doesn't need to be complicated. It DOES need to provide [...]

**[READ FULL POST \(HTTPS://WWW.PATRIOTDO-IT-NIKE/\)](https://www.patriot-do-it-nike/)**

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(<https://www.napfa.org/firm/2004/2113>)

(<http://www.letsmarkaplan.org/why-choose-a-cfp-professional>)

(<https://www.xyplanningnetwork.com/advisors/chris-brown-cfp/>)

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