

# **Compass Asset Management Group (<https://compassamg.com>)**

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(<https://www.linkedin.com/company/2350260>) (<https://www.facebook.com/CompassAMG/>) (<https://twitter.com/CompassAMG>)

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**YOU DREAM.  
WE GUIDE.**



**YOUR PORTFOLIO.  
EXPERTLY CRAFTED.**



**360° WEALTH  
MANAGEMENT.**

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**WISDOM.  
INTEGRITY.  
TRANSPARENCY.  
OBJECTIVITY.**

Compass Asset Management Group, LLC is independent, knowledgeable and creative. As a private wealth management firm, we partner with you to design the optimal financial planning and investment management solutions for your goals and dreams. We're here for life.

From the beginning we endeavor to listen and understand your highly personal financial concerns, goals, and priorities.

We are your fiduciary, delivering prudent, insightful, objective advice in the best interests of our clients at all times. We do not charge commissions on Advisory business. We serve as your trusted planner, advisor and consultant in financial matters. Relationships and trust are key elements to you — and our — success.

Serving a select group of clients, we deliver straightforward solutions to complex financial challenges with an uncompromising level of service. Our clients are highly successful professionals, executives and entrepreneurs in the fields of science, technology, education, medicine, law and more.

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## **WE'VE BEEN RECOGNIZED:**

***New York Financial Leader*** ([https://compassamg.com/wp-content/uploads/COMPALC00001\\_151228.pdf](https://compassamg.com/wp-content/uploads/COMPALC00001_151228.pdf))

– Forbes, December 2015

***Five Star Wealth Manager*** (<http://publications.fivestarpfessional.com/books/twen/>)

– Hudson Valley Magazine

(2013, 2014, 2015, 2016, 2017 & 2018)

## Financial Planning

- **RETIREMENT PLANNING** – prepare for your future by determining the strategies required to achieve the lifestyle you desire.
- **INVESTMENT MANAGEMENT** – construct and actively manage investment portfolios that represent your goals, interests and comfort with economic and market conditions.
- **COLLEGE FUNDING** – determine financial needs and develop strategies that best help you prepare for this essential and exciting phase.
- **EXECUTIVE COMPENSATION** – manage complex employee benefit plans, stock options and bonus programs to control taxes and maximize results.
- **BUSINESS SUCCESSION PLANNING** – transition from business owner to full or partial retiree status with your own unique plan and strategy.
- **INSURANCE & RISK MITIGATION** – protect your loved ones from risks associated with unforeseen interruption of financial plans and strategies.

## Investment Management

- **DETERMINE OBJECTIVES** – understand your investment goals, priorities, and time horizon.
- **DEVELOP INVESTMENT POLICY** – create the rules and roadmap for portfolio construction, implementation and risk management.
- **DESIGN AND IMPLEMENT PORTFOLIO** – develop tactical and dynamic strategies to achieve your financial goals.
- **MONITOR, REBALANCE AND ADJUST** – regularly review and update portfolio based on current economic or market trends and movement, in addition to your own changing circumstances.

## Trusts & Estate Planning

- **ELDER CARE & MEDICAID PLANNING** – determine best approach and counsel clients on how to manage and protect assets or transfer wealth with a view to avoiding Medicaid concerns.
- **WILLS & TRUSTS** – review existing plans and make recommendations for necessary documents and directives that are designed to protect you, your family and your heirs.
  - **Living Trusts & Revocable Trusts** – consider options to provide flexibility and control of your assets, avoiding probate.
  - **Irrevocable Trusts** – determine need and strategy to protect assets from Medicaid, probate or litigation while preserving and transferring wealth.
- **POWER OF ATTORNEY** – work with your legal advisor to protect your interests when you no longer can.
- **HEALTHCARE PROXY** – review directives regarding your personal health care and decisions.

## Philanthropic & Charitable Interests

- **CHARITABLE GIVING** – consider best strategies to “give back” in accordance with your special interests in medical research, financial aid or the arts, to name a few.
- **FOUNDATIONS** – work with your legal team to establish a vehicle that allows you to support and make a difference for ongoing charitable, humanitarian or special interests.
- **ENDOWMENTS** – develop a vehicle to motivate and assist the next generation to pursue educational goals and dreams.

## **WE SEE THE WHOLE PICTURE, FROM YOUR LIFE GOALS TO YOUR LEGACY — AND EVERYTHING IN BETWEEN**

Our planning process is simple but effective, in four distinct steps. After a thorough assessment of your needs and an objective analysis of your entire financial situation, we design a holistic plan for managing, structuring, and maximizing your wealth, and we collaborate with your existing advisors as appropriate. Once you approve the plan, we coordinate and oversee its implementation.

*“At Compass Asset Management Group, our underlying belief is that education and communication are the foundational precepts that empower success.”*



Annette Hall Private Client Manager



**Annette Hall, Private Client Manager**

Annette has over thirty years of experience in the wealth management industry. Utilizing a more holistic approach for her clients, she delivers the core elements of financial & estate planning combined with her strong experience in private banking. Ms. Hall has helped countless clients with the challenges of multi-generational planning, effective use of trusts, insurance protection and collateralized lending for art or yachts. Annette compliments our practice with a high touch approach to her clients' needs.

Annette holds a Bachelor of Science in Fashion Merchandising/Design and Art History from the University of Utah. She is also a member of the Hellenic American Banker's Association and Hellenic Professional Women.

Annette is an Investment Advisor Representative with Spire Wealth Management, LLC, office located at 100 Stony Brook Court Newburgh, NY.

**[Adv Part 2B \(https://compassamg.com/wp-content/uploads/Hall-ADV-2b-Apr-2018.pdf\)](https://compassamg.com/wp-content/uploads/Hall-ADV-2b-Apr-2018.pdf)**

**[Connect with Annette \(https://www.linkedin.com/in/annette-l-hall-739967\)](https://www.linkedin.com/in/annette-l-hall-739967)**



Steven M. DiGregorio President, Sr. Portfolio Manager



**Steven M. DiGregorio, President, Sr. Portfolio Manager**

Steven is a financial planner, estate planner and wealth strategist with 30 years of experience consulting and advising affluent clients. He has deep experience developing client-centric, consultative, financial planning & investment management solutions for professionals, senior executives and affluent families across multiple generations. His specialties are retirement planning, income distribution planning, executive compensation and employee benefits plans – 401(k), 403(b).

A supporter of the American Heart Association, Miles for Hope Breast Cancer Awareness and the Juvenile Diabetes Association, Steven also has a particular passion for personal health & wellness and participates in various runs and triathlons throughout the region.

Steven holds a Bachelor of Science in Business and Economics from the State University of New York at Plattsburgh. He has studied the Financial Planning curriculum at both the American College for Financial Planning and Marist College.

Steven is an Investment Advisor Representative with Spire Wealth Management, LLC and a Registered Representative with Spire Securities with offices located at 100 Stony Brook Court Newburgh, NY.

**[Adv Part 2B \(https://compassmg.com/wp-content/uploads/DiGregorio-ADV-2b-April-2019.pdf\)](https://compassmg.com/wp-content/uploads/DiGregorio-ADV-2b-April-2019.pdf)**

**[Connect with Steven \(https://www.linkedin.com/profile/view?id=AAkAAAvTdEBSpcykNSOV3qdWPYPMH3xbOIOIc&authType=NAME\\_SEARCH&authToken=FNEQ&locale=en\\_US&trk=tyah&trkInfo=clickedVertical%3Am1-1%2CtarId%3A1449714067521%2Ctas%3Asteven%20\)](https://www.linkedin.com/profile/view?id=AAkAAAvTdEBSpcykNSOV3qdWPYPMH3xbOIOIc&authType=NAME_SEARCH&authToken=FNEQ&locale=en_US&trk=tyah&trkInfo=clickedVertical%3Am1-1%2CtarId%3A1449714067521%2Ctas%3Asteven%20)**



[Ashley Squillace Financial Advisor](#)



**Ashley Squillace, Financial Advisor**

Ashley graduated from The State University of New York at New Paltz with a Bachelor's degree in Accounting. She is licensed as a Registered Representative with Spire Securities, holding licenses for the Series 7, Series 66 and a NYS Life Insurance license.

Ashley is a client relationship driven associate and works extensively with individuals interested in education planning, retirement & estate planning. She advises clients on college funding matters manages retirement portfolios and develop strategies to protect and transfer wealth through generations.

Ashley is responsible for the firm's social media & marketing campaigns, investment analysis, model portfolio design and client presentations.

Ashley is also an Investment Advisor Representative with Spire Wealth Management, LLC and Registered Representative with Spire Securities with offices at 100 Stony Brook Court Newburgh, NY.

**Connect with Ashley ([https://www.linkedin.com/profile/view?id=ADEAABpw5BcBdxrtQQ6udh5TvXhL-sCmanSj97w&authType=NAME\\_SEARCH&authToken=vi9D&locale=en\\_US&srchid=496771581449714097716&srchindex=1&srchtotat=1&trk=v srp\\_people\\_res\\_name&](https://www.linkedin.com/profile/view?id=ADEAABpw5BcBdxrtQQ6udh5TvXhL-sCmanSj97w&authType=NAME_SEARCH&authToken=vi9D&locale=en_US&srchid=496771581449714097716&srchindex=1&srchtotat=1&trk=v srp_people_res_name&))**



Julia Ciccone Client Relationship Associate



**Julia Ciccone, Client Relationship Associate**

Julia joined Compass Asset Management Group in mid 2017 as our Client Relationship Associate.

Coming to our firm with a background in office management, client service and bookkeeping, she is a great addition to our team.

Julia is responsible for client service, account opening & maintenance, administration, reporting, communications, scheduling, and warm, welcoming smiles!

[Down Week Ends Strong Month – Weekly Update](https://compassamg.com/blog/2019/07/02/down-week-ends-strong-month-weekly-update/) [Trade Talks Could Soon Restart All week, investors had one eye on Saturday’s Group of \[ ... \]](https://compassamg.com/blog/2019/07/02/down-week-ends-strong-month-weekly-update/) [Read More](https://compassamg.com/blog/2019/07/02/down-week-ends-strong-month-weekly-update/)  
[Stocks Touch Record Heights – Weekly Update](https://compassamg.com/blog/2019/06/25/stocks-touch-record-heights-weekly-update/) [The Week on Wall Street The S&P 500 hit an all-time peak of 2,964.03, in \[ ... \]](https://compassamg.com/blog/2019/06/25/stocks-touch-record-heights-weekly-update/) [Read More](https://compassamg.com/blog/2019/06/25/stocks-touch-record-heights-weekly-update/)  
[Further June Gains – Weekly Update](https://compassamg.com/blog/2019/06/17/further-june-gains-weekly-update/) [The Week on Wall Street Stocks advanced for a second straight week. The S&P 500 \[ ... \]](https://compassamg.com/blog/2019/06/17/further-june-gains-weekly-update/) [Read More](https://compassamg.com/blog/2019/06/17/further-june-gains-weekly-update/)  
[Big Gains for the Major Indices – Weekly Update](https://compassamg.com/blog/2019/06/10/big-gains-for-the-major-indices-weekly-update/) [The Week on Wall Street Stocks rallied during a week in which Wall Street was \[ ... \]](https://compassamg.com/blog/2019/06/10/big-gains-for-the-major-indices-weekly-update/) [Read More](https://compassamg.com/blog/2019/06/10/big-gains-for-the-major-indices-weekly-update/)  
[May Ends with a Retreat – Weekly Update](https://compassamg.com/blog/2019/06/03/may-ends-with-a-retreat-weekly-update/) [The Week on Wall Street Stocks struggled during a 4-day market week as the U.S.-China \[ ... \]](https://compassamg.com/blog/2019/06/03/may-ends-with-a-retreat-weekly-update/) [Read More](https://compassamg.com/blog/2019/06/03/may-ends-with-a-retreat-weekly-update/)  
[Trade Tensions Linger – Weekly Update](https://compassamg.com/blog/2019/05/28/trade-tensions-linger-weekly-update/) [The Week on Wall Street Stocks drifted lower last week as investors considered the possibility \[ ... \]](https://compassamg.com/blog/2019/05/28/trade-tensions-linger-weekly-update/) [Read More](https://compassamg.com/blog/2019/05/28/trade-tensions-linger-weekly-update/)

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## CONTACT US

We are a premier financial planning and investment management group based in the Hudson Valley, servicing clients anywhere. Let’s talk about your goals and dreams. Please contact us for an initial consultation.

**845.563.0537 (tel:845.563.0537)**

COMPASS ASSET MANAGEMENT GROUP  
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FAX: 800.420.3046

**DIRECTIONS TO OUR NEWBURGH OFFICE** (<https://goo.gl/maps/Xe2jJkS4SHm>).

Sign up for Compass 360Our Email newsletter ([http://visitor.r20.constantcontact.com/manage/optin/ea?v=001zqcU4F2bLecrrlmts\\_7Cck7MB6XuP9tpLxJBXN3pvygGJu0JrBMtQMPoxMn0rLqooZlcvMh1egw%3D](http://visitor.r20.constantcontact.com/manage/optin/ea?v=001zqcU4F2bLecrrlmts_7Cck7MB6XuP9tpLxJBXN3pvygGJu0JrBMtQMPoxMn0rLqooZlcvMh1egw%3D)).

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