

In caring for our clients' wealth, we are guided by lessons learned from our own life stories: Reaching one's goals takes experienced planning, perseverance and, often, a helping hand.

At Shoreline Asset Management you'll find we're a little different ... in a good way.

The first thing you'll notice is our enthusiasm for ensuring your wealth is more than simply managed. It's made meaningful ... in whatever ways mean the most to you. At Shoreline, you'll discover:

1. A **personal way** to connect to your individual and professional wealth
2. A **smart way** to navigate Wall Street (Hint: It's about YOU, not them)
3. A **sensible way** to think about investing
4. A **disciplined way** to organize your assets

According to these principles, we offer wealth management services to fellow business executives/owners, doctors, and other professionals. We care for and coordinate our clients' personal wealth, family interests and professional obligations, across the phases of their lives and their careers.

That's a little different, don't you think?

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INDIANAPOLIS

11495 North Pennsylvania Street
Suite 130
Carmel, IN 46032
Phone: 317.708-2470
Fax: 317.708.2465
Email: info@shoreline-llc.com

NEW CASTLE

412 S. Main Street
New Castle, IN 47362
Phone: 765-593-2487
Toll Free: 877-521-4541
Fax: 765-521-4629
Email: info@shoreline-llc.com

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