

CONTACT US

Our Services



Investment Management

Starboard's investment management process is based on as a single premise: Give our clients our "best thinking" from what we believe are some of the brightest minds we know. Our Investment Committee embodies this and represents a diverse cross section of back grounds, opinions and information sources to help drive our strategic investment management recommendations to the families we serve. In

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Financial "Life" Planning

Starboard's financial planning principles are centered around a central point - we are all on this earth for a limited time and money at its best use provides families flexibility and financial assurance. Maximizing and protecting these principles is at the core of our philosophy. When Starboard begins work with families we approach their lives in a wholistic fashion in order to attain a complete summary of their financial affairs,

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Family Office Services

For those families with a significant amount of concentrated wealth and the desire to manage those assets from a single office, we offer a suite of Family Office Services as well as dedicated personnel, state of the art systems, and fiduciary expertise. Starboard's Family Office Services include private foundation management, integrated tax planning oversight, trustee services, special asset class research, bank

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Private Trustee Services

Often as an extension of our long-term relationships with families we are asked to serve as personal trustee and assist them with the stewardship of transferring their wealth to the next generation. We will serve as trustee and when needed executors for families along with the required reporting and monitoring these services require to beneficiaries, co-trustees and other related parties.

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Our Story

Definition of Star•board: Starboard is the traditional nautical term for the "right" side of a ship's hull and represented by the color green for navigational purposes. In addition, sailing vessels must give the "right of way" to sailboats on starboard tack (where the wind is coming over the right side of the vessel) and be provided clearance for safe passage.

Starboard Advisors was founded by Barton Weisenfluh in partnership with the Kelleher Family Office and their holding company Kelleher Financial Advisors, LLC. The firm provides a dedicated platform exclusively serving families as a single point of accountability for the stewardship of their financial lives.

Our Differentiation

Starboard has forgone the traditional financial advisory models to provide a dedicated **"family office"** to a limited amount of clients in North America.

We are committed **fiduciaries** and have built a firm that is dedicated solely to the families we serve. Starboard has eliminated or avoided the conflict of interests inherent with most financial service firms.

Starboard's Investment Committee and Advisory Board has been formed to provide well informed and unbiased advice for long term investment and financial planning. We are proud of the **intellectual capital our Investment Committee and Advisory Board** provide for investment policy as well as guidance on helping clients solve their sophisticated planning needs.

Starboard is 100% focused on serving as **trustee and advisor to family's financial lives** often helping guide multiple generations through the many decisions afforded by their hard-earned assets.

Our job is to assure the maximization of clients "lives" as well as their net worth. True financial planning is as much about understanding and appreciating the finite time we all have on this earth so we can enjoy it to the greatest extent possible. Identifying and fulfilling those goals for clients is a far more nuanced process than any algorithm, pie chart or off the shelf product can ever provide.

Ultimately, we measure our success on whether we are able to help make our clients' lives "better". Our job is to help maximize client's lives, not necessarily their net worth. Of course, we feel we manage people's money well and ultimately our clients are seeking someone in their corner and who is skilled and a true fiduciary.

Our Crew



Barton W. Weisenfluh, CFP®,

Founder & President -

Starboard Advisors

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Rita M. Newland, Principal -

Starboard Advisors

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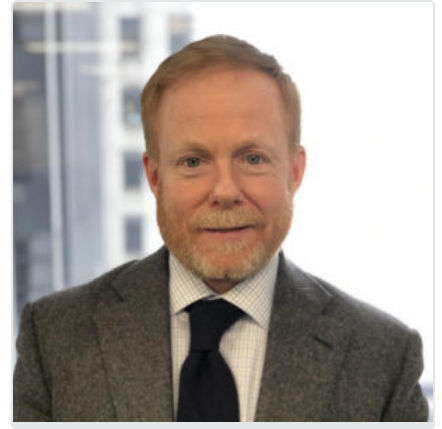
Hannah Andrews, Principal -

Starboard Advisors

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Advisory Board



Investment Committee



Hugh O'Donnell
Investment Committee

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Michael Ouellette
Investment Committee

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Colleen Kelleher Sorrentino
Investment Committee

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Christopher DeMeo
Investment Committee

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Russell O'Brien
Investment Committee

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Dana Kerr
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Tom Burnett
Investment Committee

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Barton W. Weisenfluh
Founder & President

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