



CONTACT US NOW

goal
p: (508) 481-2299

MENU

Polaris Advisors

is a fee only Registered Investment Advisor helping individuals and small institutions build, manage and grow investment portfolios to support their lives and charitable missions.

Our Philosophy

We believe our clients should be treated as if they were valued customers in the trust department of a bank, rather than just accounts at a brokerage firm. First and foremost, that means they should receive Investment Management Services delivered under the Fiduciary Standard, and not some

watered down "Suitability Rule" that allows an advisor to receive commissions. Commissions can taint an advisor's judgement through compensation that's contrary to a client's best interest. Commissions are for investment sales, not investment advice!

Beyond that, we know our clients will have questions and concerns about a range of issues, not the least of which would include taxes, loans, insurance, estate plans and major purchases. Therefore, we encourage our clients to call on us for answers to all their financial questions. If we don't know the answer, we'll research it for them.

We serve a limited number of clients so we can provide them with unlimited levels of service.



WHAT'S NEW:

- In our [2nd Qtr 2019 Newsletter](#), there are some articles about consequences for Americans unprepared for retirement.
- To better assist you with your retirement planning, investment planning, estate planning, and financial planning, please call us at 508-481-2299 ext 7125 for your free consultation.

We welcome your inquiry about how we can be of assistance to you.

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DISCLOSURES

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