

Financial Institution Strength and Stability



BROKER DEALERS
Bolton Global Capital
Bolton Securities Corp
SERVICES
Wealth Management
Trustee Services
Retirement Planning
Cash Management Solutions
Liquidity Solutions
Private Client Group
Account Aggregation
Account Protections
CLEARING AND CUSTODY
BNY Mellon Pershing
Charles Schwab
Raymond James Financial
Pictet

Bolton Capital Group

Since 1987, Bolton Capital Group has been a service provider to its affiliated securities broker dealers and its SEC registered investment advisor. The company provides legal, compliance, administrative, trading and technological support to a network of more than 50 affiliated offices worldwide. Our broker dealers provide the clearing and custody platforms on a global basis for the clients of the premiere wealth management teams in the business.

Client assets are held through BNY Mellon Pershing, Charles Schwab, Raymond James Financial and Pictet. Through our clearing and custody partners, we offer the full range of products, services and technologies available through the world's largest financial institutions. Our goal is to provide a superior value proposition to our clients in terms of financial institution safety and security, service and product capability, transparency and pricing through a network of financial advisors who share our commitment to business of the highest quality.



