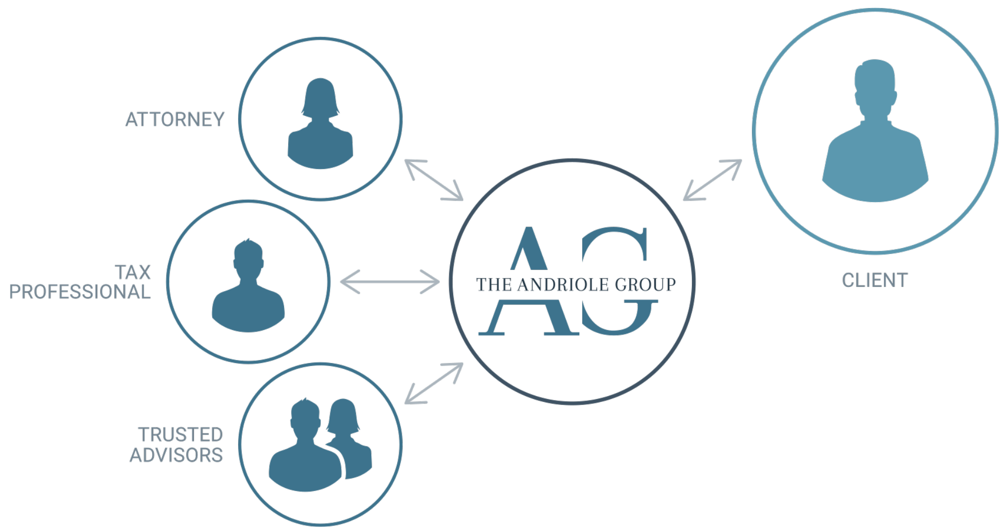
THE ANDRIOLE GROUP

Success through Balance.

CONCIERGE SERVICE

Your Personalized Board of Trusted Advisors

For families with a complex and significant wealth picture—we understand that a portfolio is not comprised of one asset class. Our clients often find themselves with multiple trusted advisors managing complex, individual pieces of a much larger puzzle. We find they are often missing a key advocate to foster collaboration and steward implementation, which is where we take the lead.



We view your advisory team as a corporation or nonprofit would view its board of directors, where each member has specific responsibilities. We leverage these relationships into establishing your family's personalized board of trusted advisors. By taking the leadership role in coordinating the financial planning, investment, tax, legal, banking, and estate planning pieces with each industry professional, we ensure that every detail is implemented properly, providing the infrastructure for your family's prosperity to continue as intended for generations to come. As independent fiduciaries, we provide this tailored approach either on a flat fee basis or as part of a comprehensive wealth management relationship, depending on what is in the best interest of you and your family.

Our concierge approach includes:

+ FINANCIAL PLANNING
+ INVESTMENT MANAGEMENT
+ RETIREMENT AND ESTATE PLANNING
+ RISK MANAGEMENT AND ASSET PROTECTION
+ TAX PLANNING
+ FINANCIAL RECORDKEEPING
+ FAMILY GOVERNANCE AND STEWARDSHIP

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