GOLDEN POND
WEALTH MANAGEMENT EST 1996

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Guiding You to Your Golden Pond: Our Services & Capabilities

Golden Compass:

- Investment Management
- Investment Policy Statement (IPS)
- Comprehensive independent research & investment strategies
- Efficient sustainable income
- ESG/impact integration

Golden Circle:

- Collaborate & coordinate with your valued advisors
- Family meetings & strategy
- Review, reflect & revisit

Golden Anchor:

- Collaboration & confidentiality
- Plan & seek to protect your estate
- Align risk & reward
- Tax awareness & minimization strategies

Golden Pond:

- Your captain & crew
- Family owned, locally operated
- Advanced technology
- Disciplined stewardship
- Selective & focused
- Invested alongside YOU

The goal of our firm is to help families maximize their **Golden Years,** in which they pursue wellness and happiness, enjoy hobbies, travel, and cross items off their bucket lists. Further, we seek to connect clients to both their communities and generations of their families through legacy and philanthropic planning.