Old Port Advisors

Est.1994

Partners for a Secure Future

Enjoy life.

Live today and tomorrow to the fullest.

We all want the freedom to dream, to experience real wealth.

True prosperity is built on dreams achieved.

Think about your future. What do you see? Retirement the way you want it? Having the time and means to explore new corners of the world? Giving your children or grandchildren the gift of a college education? Crossing things off your bucket list? Leaving behind a legacy that serves your family and the world?

We're here to help make your dreams come true.

Our growth story: an unwavering commitment to helping others.

Our story began in 1994, the year we opened our doors as Investment Management & Consulting Group, a boutique and fiercely independent investment advisory firm. Our vision was simple: put clients first and help them grow and protect their wealth over time.

We were eager then and carry our enthusiasm with us today. To us, it all begins with trust. From early on, we made it a point to build strong relationships with our clients, to learn about their lives, families, professions, hopes, and dreams. Because we understand that wealth has to do with a lot more than money.

Over the years, we've welcomed new faces, forged partnerships, changed street addresses, and seized opportunities. We've navigated the financial landscape to help clients while all along holding steadfast to the belief that all people deserve the freedom to enjoy life today and tomorrow.

Why clients choose to work with us?

Our unique approach

We take a values-driven, personalized, collaborative, and strategic approach to investing and wealth management. We begin by getting to know you, our client, learning everything we can about your financial goals, life experiences, family and other circumstances, comfort level when it comes to taking risks, and more. Then, we roll up our sleeves and get to work with you by our side. Together, we uncover your dreams, design a plan, and secure your future so you're free to enjoy life.

Our delivery model

We serve as the epicenter of your financial life. We get that everything is connected, which is why we collaborate with other advisors to provide seamless solutions in one place.

Our steadfast focus on long-term growth

Trends? We don't follow those. We build value-oriented, balanced portfolios and make decisions based on long-term fundamentals rather than short-term price considerations.

Our values

In working with you, we pledge: honesty, integrity, competence, trust, respect, hard work, balance, and yes, a dose of humor to keep life fun.

Our independence

We are independent registered investment advisors with a fiduciary responsibility to act in your best interest. Old Port Advisors does not accept any fees or compensation based on product sales. At many financial services and brokerage firms, commissions and corporate oversight influence advisors and limit investment options. We eliminate these factors and answer only to you. Our fee-for-service model of compensation is based on a modest percentage of your portfolio. We only gain if you do. We make decisions centered on you.

Our hallmark philosophy that sets you free.

Enjoy life.

RELAX. We'll connect the dots for you.
It's okay if you don't have the time, energy, or know-how to navigate the financial landscape as it relates to all aspect of your lives – because we do.

Count on us to deliver comprehensive, integrated investment management strategies – ultimately supporting your overall financial wellbeing.

Do the things you love.

TRUST. We'll do the thinking for you.
We know. You appreciate balance, which is why we combine discipline and innovation to deliver optimal results.

Our thoughtful decisions are based on research, experience, judgment, and knowledge and translate into stability and success for you.

Reach your dreams.

ACHIEVE. We'll design around you.
You drive every decision we make. We listen to you, focus on your goals and life experiences, and create individualized portfolios and wealth management strategies to help get you where you want to go.

Your voice matters. Understanding your unique needs is the only way to design around your best interests. We are here to advocate for you. When you win, we win.

The time is now.

Our wealth management services.

Investment management

Let's face it, today's market is complex and can be downright intimidating. The good thing is, people don't need to go it alone. We're here to help.

We offer professional asset management with an emphasis on discipline. For us, analysis trumps intuition and hearsay, fundamentals transcend fads, and tomorrow's greater gains outweigh today's fleeting interests.

Our independent and dedicated portfolio managers combine their knowledge with in-depth research and innovative technology to create and execute custom portfolios for clients. Our goal is simple: produce financial rewards over time.

We always start with clients, learning about their needs, tax status, and risk preference. Then, we thoughtfully build a value-oriented, balanced portfolio. Finally, we continually evaluate performance and make adjustments as appropriate.

Financial planning

We offer unbiased and sound advice for every facet of our clients' financial lives: retirement planning, college planning, estate planning, and so forth.

We begin by understanding their needs and what's important to them. Then, we work with a team of experts to deliver integrated services ranging from investment advice and accounting services to legal planning and tax services.

After we map out our clients' wealth management process, from discovery through periodic review and adjustment, we work diligently with them to keep their financial affairs on track and running smoothly.

How we help protect and grow your wealth.

Trust services

Although we do not serve in the capacity of a trustee for our clients because of the inherent conflict of interest, we do work closely with trust and estate attorneys who serve as trustee while we manage and custody the investments. This is yet another example of how we work in tandem with other professionals to streamline our clients' financial lives…to make things easier.

Beneficiaries of trusts do have choices, but sometimes it's hard to recognize them. Some trusts are very restrictive; others are more flexible in terms of who manages assets and/or who serves as the trustee(s) of the trust. We can help determine what options are available and leverage our established relationships with a number of national, fully independent trust administrators to meet our clients' trust services needs.

Fiduciary consulting

As fiduciaries for retirement plans and endowments, we provide independent, unbiased, forward-thinking guidance and experienced, resourceful oversight for plan sponsors and investment committees. Why? So clients can focus on running their business knowing their retirement plans or endowments satisfy required regulatory guidelines and follow industry best practices.

Retirement plan and endowment assets require attention, expertise, and time. There's no need for clients to invest their precious time and energy on this when they're trying to build a company.

As independent investment fiduciaries, we offer comprehensive services including investment policy statement design, investment monitoring and fund menu design, comprehensive educational programs for participants and committee fiduciaries, fiduciary audit reviews, and management of the request for proposal (RFP) process – all built around clients. We're not paid by any vendors or fund families. We're driven by our sincere desire to help clients save money, reduce liability, increase service levels, improve performance, and ultimately, allow their retirement plan participants and endowment beneficiaries to plan their futures and achieve their goals.

In the end, it's all about people.

Our team

Each and every member of our team brings unique strengths to the table. More importantly, they bring a set of values that our firm stands for: honesty, integrity, discernment, balance, respect, confidence, a strong work ethic, and a genuine commitment to people and community.

We started small and have grown in size over the years. What hasn't changed is our delivery of outstanding and personalized client service. We're here for clients and put their needs first, always. We work well as a team, all pitch in toward the advancement of our firm, and want nothing more than to see our clients reach their dreams.

Our community

In addition to helping our clients, we're deeply committed to serving our community. After all, this beloved place – the Old Port and its outlying communities – is where we call home. We care about what happens here and we want to give back.

Stewardship has been part of our fabric from the get go. Since our founding, we have supported many organizations including: The Dream Factory, Portland Chamber of Commerce, The Wayfinder School, North Yarmouth Academy, Institute for Civic Leadership, Preble Street Resource Center, Center for Grieving Children, and Big Brothers Big Sisters.

We're vested in our community. We're vested in you.

Design your future. It's up to you.

Old Port Advisors is a boutique investment advisory firm that invests in clients and their lives, affording them the FREEDOM TO ENJOY LIFE today and tomorrow.

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