Yesterday, today, tomorrow.

Our journey.

Yesterday

Our story

Twenty years ago, we had a vision. We wanted to create an independent investment management firm centered on Clients where their interests came first. Imagine that. A place where people knew your name, cared about your kids, asked about your dreams – vested in you and your WHOLE life.

Our principles were simple and still ground us: a values-driven, personalized, collaborative, and strategic approach to investing and wealth management.

With you by our side, we started small and dreamt big, welcomed new faces, created partnerships, changed street addresses, and seized opportunities. We navigated the financial landscape to help clients and volunteered our time in this beloved community.

And what better way to celebrate success than to build on it!

“The only time you should ever look back is to see how far you’ve come.” —unknown

Today

Get ready to soar!

We’re growing and evolving in big ways – and we’re doing it smartly, making strategic decisions based on our history, our strengths, and our vision.

As we celebrate our progress, we’re proud of where our firm was born and continues to flourish, Portland, Maine – specifically, the Old Port. We embody many of the same characteristics as this beloved harbor town. Intently small but play big. Rooted in tradition yet progressive in mindset. Hardworking. Authentic. Independent. Resilient. Community-centric. Unwavering. A trustworthy place people come back to time and time again.

To honor this connection, commemorate 20 years in business, and embark on the exciting future that lies ahead, we are changing our name.

“Any moment called now is always full of possibles.” —China Mieville

Tomorrow

We're changing our name. Not our calling.

We are not changing. We're peeling back the layers to reaffirm what we stand for and evolving to provide even greater, more comprehensive service.

Clients will continue to enjoy the level of care they've come to rely on – and they'll see the same faces. Fred Williams will continue to lead the team joined by the return of his original co-founder, Tom Donaldson. Today's team also includes six portfolio managers, four associate portfolio managers, and two administrators.

New technology, abundant resources, independent custodians, and ancillary consulting services will support this team. We've invested in new client and wealth management software, as well as research tools to enhance communication, allow us to work more efficiently, introduce a diversity of ideas, and deliver best results.

We're excited to build on our past and deliver on our brand promise. Together, let's build a secure future – and enjoy life!

Investment Management & Consulting Group

Old Port Advisors

Partners for a Secure Future

Changing our name is part of a rebranding effort and our pathway to taking the firm to the next level. We invite you to celebrate this milestone with us, and we assure you what won't change is our service and commitment to excellence.

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.

We're all about giving you freedom – financial freedom, freedom from stress and worry, freedom from having to know all the answers, and freedom to do the things you love.

RELAX. We connect the dots so clients can enjoy life.
We serve as the epicenter of clients' (financial) lives. We invest in clients and their whole lives, collaborating with other advisors to support their overall financial wellbeing.

TRUST. We do the thinking so clients can do the things they love.
We invest at the intersection of discipline and innovation, make decisions based on long-term fundamentals, and combine research, experience, judgment, and knowledge to deliver optimal results.

ACHIEVE. We design around clients so they can reach their dreams.
We design investment strategies – and other services – around our clients. We listen to our clients, focus on their goals and life experiences, and create individualized portfolios and wealth management strategies.

Old Port Advisors

Est. 1994

Partners for a Secure Future

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