

What Sets Us Apart

It is no secret The Monitor Group is well known as a top financial planning and wealth management firm. However, we realize our service is not right for everyone! As a result, we have found it helpful to list some of the things about The Monitor Group that our clients have said make them satisfied and happy.

Peace of Mind Our clients don't want to be on the "bleeding edge" owning possible high-return investments (with this comes high risk); they want to sleep at night. Our clients do not want to be involved in the frantic activity associated with short-term trading or in the gambling element that can be injected into investing. We provide sound, low-cost investments using the same investment strategies as large institutions such as pension funds and major charitable organizations.

Individualized Attention Our clients want to work with someone who takes their individual circumstances into account when giving them advice. The Monitor Group takes the time to develop an overall view of each client's unique financial situation. We are a small firm using a team approach to get to know each client personally.

Investment Expertise We are full-time professionals with specialized education and years of experience in investing and solving various financial issues. Our clients know you cannot develop adequate investment skills from reading consumer finance magazines on the weekends, browsing the Internet, or watching CNBC.

Objective Advice We always provide 100% objective advice, not sales talk. Most who offer financial and investment advice are product salespersons of one kind or another. The only thing we "sell" is our expertise and experience.

Fee-only Compensation We avoid all conflicts of interest because our firm is compensated solely by our clients. We do not accept commissions from the sale of investment or insurance products. This means we truly serve as a financial fiduciary for our clients, acting as their advocate in addressing their financial goals and concerns.