Our Resources

WEALTH PLANNING
- Retirement Planning
- Estate Planning
- Education Planning

INVESTMENT CONSULTING AND MANAGEMENT
- Investment Advisory Services
- Investment Committee
- Fiduciary Services
- Portfolio Management Group
- Alternative Investments

WEALTH PRESERVATION AND TRANSFER
- Investment Advice
- Insurance
- Philanthropic Services

CAPITAL MARKETS
- Equity Capital Markets
- Equity Structured Products
- Global Fixed Income
- Fixed Income Structured Products

BUSINESS OWNER SERVICES
- Capital Strategies
- Cash Management
- Retirement Plans
- Business-Succession Planning
- Insurance

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AT CITI PERSONAL WEALTH MANAGEMENT

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Citi Personal Wealth Management

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PREMIER CAPITAL GROUP
AT CITI PERSONAL WEALTH MANAGEMENT

Managing Your Wealth, Growing Our Relationship

OUR MISSION

Our mission as Financial Advisors is to help our clients grow their assets and preserve their wealth. To support our mission, we believe it's important to have access to a wide array of investment capabilities.

When working with clients, we first get to know their goals and preferences. Then, we can tap into the resources of our company and our team to provide in-depth investment services based on each individual's needs. Our clients can benefit from a one-on-one relationship with a primary advisor, as well as the combined knowledge and experience of our full team.

Our Vision

Smart planning starts with asking the appropriate questions and knowing where to find the answers. Our relationship with our clients is built on providing solid life-planning advice, as well as supplying access to the knowledge, experience and vast resources of our firm. Equally important is the open communication and personalized attention given to our clients, so they know that we are available to them.

Meet the Professionals

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Portfolio Management

Charting a prudent course to financial independence is a difficult task that many investors try to navigate alone.

At Citi Personal Wealth Management, our objective is to design personalized investment strategies that can help you with your long-term financial goals. Like a growing number of our clients, it makes sense to work with experienced investment professionals who understand your financial needs and have the time and resources necessary to help you achieve them.

Through the Portfolio Management Group program, our clients have access to portfolio management services that once were only available to large institutions and ultra- high-net-worth individuals. Our professional investment management approach focuses on the long-term financial needs of clients and strives to deliver a high level of personal comfort.

Acting as your portfolio managers, approved to construct and manage customized strategies within this program, you'll find that our training, experience, commitment to service and investment philosophy can prove invaluable, not only in managing your portfolio, but also in helping you understand its inherent risks.

We adhere to a well-conceived, three-step investment process that encompasses setting financial objectives, creating a tailored strategy and monitoring your portfolio continuously on a fully discretionary basis. In addition, all transactions executed at the firm, plus a full range of investment services, are wrapped in one asset-based unified fee structure.

Portfolio management has afforded us rewarding client relationships, based on a joint commitment to pursue our clients' financial goals within the framework of our long-term investment discipline.

Certain services are provided by an affiliated sub-adviser.