

GROW AND PROTECT YOUR WEALTH

Your business has always been more than an entity; it is a part of who you are. A private business often serves as a reflection of your own personal beliefs and standards. Not only have you given it a significant share of your time, but your personal wealth has likely been invested in it as well. Beyond that, you may have family serving prominent roles in the business, as employees, shareholders or members of the board.

At Guardian Partners, we understand this. That is why we offer our business owner clients a dramatically different vantage point, with a personalized client experience. We provide independent thinking and highly specialized investment solutions tailored to your unique wealth goals and familial relationships. Your business is not like any other; your advice should be just as unique.

WEALTH PLANNING FOR BUSINESS OWNERS

**INSIGHTFUL SOLUTIONS.
THOUGHTFUL PARTNERSHIP.**

WHAT WE PROVIDE

Our team offers holistic, independent and bespoke advice to business owners and their inner circle.

ADDRESSING YOUR UNIQUE NEEDS

When you sell your business, you are faced with the difficult decision of what to do next. Our team knows this and works with you to thoroughly analyze your unique circumstances and goals, then to directly chart the next steps of your financial journey. We aim to ensure the financial benefits that came from the sale of your business will allow you to take these steps, keeping your future wealth transfer needs in mind.

SHAPING YOUR SOLUTIONS

As you transition away from your role as business owner, we use our experience and expertise to help you understand and manage new risks. We know what makes this transition unique and how to optimize it. We also take an objective-driven approach to portfolio construction. We are committed to you, not to selling products.

CUSTOMIZED PARTNERSHIP

We assemble a team to prepare your family for wealth. Working with you and your advisors, we take a collaborative approach that allows us to create and sustain strategies that are built with risk management at the forefront, ensuring your personal team is instrumental in the process.

STRENGTH AND STABILITY

Backed by the scale, strength and almost 60-year reputation of Guardian Capital Group, our parent company, Guardian Partners' independent thinking and unbiased, thorough research and analysis set us apart.

*Contact us to learn more about how we can
help you achieve your unique financial goals.*



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