



WEALTH MANAGEMENT



The True Value of an Investment Committee

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While we believe that Wealth Management is the key to a successful financial future, Investment Management is the core of what we do. And successful Investment Management requires a team of experts that meet regularly about portfolio positions. No one person is truly able to successfully manage your money. Successful money management requires the expertise of a team of tenured individuals. Just as governments thrive on a checks and balances system, so do successful investment managers.

In order to build, maintain and continuously improve our portfolios, we employ the vast knowledge of our Investment Committee. Their diverse knowledge allows us to formulate strategies that enhance our portfolios. Additionally, our international experience, including living, working, and having offices abroad, allows us to employ knowledge on how world events may impact portfolio positions. This combined knowledge provides the groundwork for the portfolios we create that help our clients navigate a map to success in their future financial lives.



The Reilly Financial Advisors Investment Committee, headed by Chief Investment Officer David Cariani, CFA, CFP®, is comprised of CFA and CFP® professionals, a Yale-educated Ph.D., and our founders, who collectively represent over 100 years of investment experience.

This team of tenured professionals meets regularly to develop ideas and analyze portfolio holdings, and to discuss the impacts that economic trends, both stateside and global, will have on our portfolios. Our personalized stock and bond portfolios efficiently and cost effectively provide clients with a variety of risk-weighted investment options, all adhering to the fundamental principles of asset allocation. Our in-house research and analysis team, including David, monitors our portfolio holdings each and every day.

If your advisory team doesn't employ a specialized Portfolio & Analysis team, a dedicated Chief Investment Officer, and an Investment Committee, isn't it time you spoke with Reilly Financial Advisors and our specialized team?

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Honesty | Truthfulness | Reliability | Caring

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