

Investment Advisory Firms

We are interested in acquiring other investment advisory firms. We have particular interest in fee only fully discretionary portfolio management firms. If you are ready to retire, or want to put a succession plan in place, contact us for a confidential conversation. Please contact Cindi Showalter at cindi@csawm.com or call 276-634-0000 today.

We would also be interested in working with financial planning firms, investment advisors, or other people and firms working with portfolio managers in a RIA relationship.

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