

# Who We Are



## The Reynders, McVeigh Way

At Reynders, McVeigh, we are completely committed to you, our client. We foster one-on-one relationships so that we can fully understand your unique aspirations and values. We then build and maintain a tailored financial plan and investment strategy that meets your specific risk, return, and income needs. Through this long-term lens, we create sustainable portfolios that align with your values and stay rooted in sound investment fundamentals.

## Our Firm

- Trusted advisor to high-net-worth clients, family foundations, trust departments and law firms
- Assets under management of more than \$1.9 billion
- Additional assets under advisement of \$4.7 billion
- Access to an experienced team of in-house wealth managers
- In-house equity research team
- In-house fixed income specialists
- Selected private alternative investments

## Our Commitment

- Regular investment reports with easy-to-read graphical allocation, performance, and risk data
- Quarterly market outlook
- One-on-one attention with a trusted advisor
- Day-to-day account activity monitored by dedicated client service professionals
- Client meetings scheduled as often as needed

## Fees

- Simple, transparent fee structure
- Low management fees
- No custodial fees
- No soft dollar arrangements

We are bound solely to our clients, not outside product providers. We believe that following consensus seldom leads to real opportunities. We rely on our own internal research and maintain a disciplined investment process designed to uncover opportunities others may have overlooked, challenge assumptions, and bring our best ideas into portfolios.

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