

*Confident navigation for high net worth clients.*



**FAIRPORT**  
ASSET MANAGEMENT



A WEALTHTRUST COMPANY 

FAIRPORT  
ASSET MANAGEMENT



A WEALTHTRUST COMPANY 



*Partnership*

*Solutions*

Wealth management. Holistic advisors.  
Commitment to serving the needs of  
the high net worth community.

*We're Fairport Asset Management.*

Our advisors understand the concerns of  
high net worth individuals and families,  
especially when experiencing life's  
transitions. We have an expertise and  
affinity for serving the unique needs of  
those in transition and offer specialized  
advice regarding:

- Succession and liquidity planning for  
business owners
- Private equity and restricted stock  
analysis for executives and professionals
- Financial issues and education unique  
to women





itions



Discipline



Value

Clients benefit from a broad range of wealth services, with investment management as our core expertise. Your counsel is fee-based, which means we do not receive transaction commissions or accept third-party compensation. It means advisors who are free to be objective, to think independently and are not confined to any set of products. It means customized solutions suited for your needs and aligned with your goals.

Fairport makes a difference. We help you and your family to navigate life's expected and unexpected events. Clients turn to us for confidence when planning for a child's or grandchild's education, assuming inheritance, buying or selling a business, coping with the death of a spouse or adjusting to changes from a divorce. We offer sound advice and support before, during and after any significant life transitions. You can rely on Fairport Asset Management. That's the difference.

Clients with a net worth of at least \$2 million and \$1 million or more in investable assets are best served by Fairport's expertise. We're most effective when clients share important and sometimes sensitive details of their lives, goals, aspirations and concerns.

Every client-advisor relationship is supported by a dedicated team of professionals attuned to the client's unique objectives. Our goal is to exceed client expectations through the comprehensive management of financial needs:

**Asset Allocation Strategies**

Provides a sense of control through the comprehensive and efficient management of assets

**Investment Management**

Delivers confidence through diversified investment portfolios that accommodate a broad range of risk preferences aligned with an individual's goals

**Net Worth Statement**

Gives direction when preparing for future events, as it details what you own, how these assets are titled (husband, wife, trusts, family partnerships, other) and which liabilities have claims

**Cash Flow Analysis**

Offers a feeling of security as it forecasts future flows of income, expenses and asset growth that also allows for the unexpected

*Fairport Asset Management. That's the difference.*

**How can we support you?**

Please consider meeting our advisors, hearing from our wealth management professionals and learning more about our client teams. We'll schedule a meeting at your convenience and at no obligation or fee. Please contact us at (216) 431-3000 or email [objective-advice@fairportasset.com](mailto:objective-advice@fairportasset.com).



*We are...*

Focused on helping high net worth families and individuals align their wealth to achieve their goals.

...

Financial planning and tax experts who provide comprehensive, creative wealth management solutions.

...

Committed to realizing an all-encompassing asset allocation strategy and can monitor the entirety of a client's investment managers, regardless of whether we're providing investment management services.

...

A client's source for unbiased, tailored advice; operating as a fee-based advisory firm, we do not accept transaction commissions or third-party compensation.

...

Locally managed by shareholders and dedicated to reliable and consistent service.

*Fairport Asset Management. That's the difference.*

FAIRPORT  
ASSET MANAGEMENT



A WEALTHTRUST COMPANY 