

Our Approach to Working with Executives & Professionals in Transition

Transitions...including alternative investment and restricted stock considerations...
bring new responsibilities and questions.

At Fairport, we are dedicated to guiding clients before, during
and after these significant events.

Fairport understands the unique needs of executives and professionals who:

- have access to alternative investments, restricted stock and/or phantom shares and look to a wealth manager to help weigh their options;
- need ongoing independent, objective advice and analysis;
- want to achieve their dynamic personal, family, economic and philanthropic goals.

The Fairport Advantage:

Our professional advisors (which include CPAs, CFP® certificants and CFA charterholders) have experience working with high net worth executives and professionals at every stage of life to coordinate and implement a comprehensive financial plan that fits their distinct situation. Fairport has the capability to interface with other professionals on the client's behalf to deliver an integrated, focused experience.

Fairport's expertise in working with executives and professionals stems from decades of experience. The importance of listening and continually connecting with them throughout the relationship is paramount. Fairport's professionals understand how challenging and complex these decisions can be and serve to protect the client's wealth.

The Fairport team is adept at providing strategies that are specific to the issues faced by executives and professionals in transition. These strategies include examining tax implications of pension plans/options, generating forward-looking cash-flow models, and implementing investment strategies to provide the client with peace of mind.

Confident navigation for high net worth clients.