DIRECT ACCESS TO PORTFOLIO MANAGERS

Don’t Get Handed Off...

Many firms will assign a less experienced “Relationship Manager” to a client that will provide ongoing service once the onboarding process is complete. At ARS, the senior-level officers of the firm are directly responsible for the ongoing relationships with each client. This helps ensure that there is never a gap in available experience and access to quality individualized advice and monitoring.

Talk To The Portfolio Manager...

Our portfolio managers are part of our full-time, in-house team, and not only help craft each retirement strategy but are also always accessible to our clients. You will know who is making the investment decisions for you and they are an invaluable resource for those seeking to stay actively involved in the investment process. Our already competitive fees include this service and are available for those looking for research, detailed investment rationale, and timely information crucial to making the appropriate investment decisions.

This Expertise Includes:

- Certified Investment Management Analysts (CIMA®)*
- Certified Fund Specialist (CFS®)*
- Certified Financial Planners (CFP®)*
- Accredited Investment Fiduciaries (AIF®)*

Call Us And Get To Know Our In-House Team of Specialists That Are Ready To Go To Work For You.

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*For more information about our specialists and their accreditation, please go to www.PILOTMONEY.com.