

## Ashbridge Client Service

**For more than fifty years, Ashbridge has guided clients through a myriad of challenges. The senior members of our team have extensive experience directly managing assets and executing intricate wealth management strategies.**

### **At the Outset**

- ▶ Listen intently to fully understand client objectives
- ▶ Evaluate existing investments
- ▶ Recommend changes to optimize portfolio

### **Execution**

- ▶ Adopt strategic investment policy
- ▶ Propose investment strategies
- ▶ Implement transition

### **Ongoing**

- ▶ Monitor capital markets and client circumstances
- ▶ Develop and implement changes as warranted
- ▶ Communicate
  - Written reports
  - Frequent conversations
  - Face-to-face meetings

