# Independent. Transparent. Comprehensive.

## *Measured Wealth Private Client Group, LLC*

Ask Edward H. Benway what sets his wealth management firm apart, and he doesn't miss a beat. "We're large enough to handle the complexities, yet boutique enough to provide the service," says the founder and president of Measured Wealth Private Client Group, LLC.

Probe a little deeper, and Benway will tell you about the unique way he and his team manage risk and volatility throughout the economic cycle. "It's been proven over the last hundred years that assets perform differently in various periods of the economic cycle. A tactical rotation of weightings within the economic cycle helps reduce volatility and enhance the overall return."

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*– Edward H. Benway*

A Chartered Financial Analyst (CFA) with two decades of industry experience closely monitors economic cycles and helps guide investment decisions, Benway says. "A lot of firms don't have an academically accredited analyst on staff. We can't imagine not having one."

Based in Portsmouth, New Hampshire, Measured Wealth Private Client Group has been serving the financial needs of retirees, pre-retirees and business owners for 25 years. Though Benway was initially a solo practitioner, he has built up and fine-tuned his

Edward H. Benway

team over the years to include professionals with multiple perspectives and credentials.

"In today's complicated world, you need a solid, well-rounded team that brings to bear wide-ranging experience and areas of expertise," Benway says. "The one- or two-advisor practice simply can't keep up with everything that's going on."

### Clients' Interests Always Come First

As an independent firm, Measured Wealth Private Client Group is free to recommend any financial product it believes will best serve the client's interest. "There are no conflicts of interest," Benway explains. He notes that the practice is a fiduciary, required by law to put clients' interests first. "We never lose sight of the fact that we are stewards of our clients' wealth," Benway says. "We're well aware it's their money, not ours."

In Benway's experience, "though a lot of people talk about financial planning, few really do it." As far as he is concerned, a comprehensive plan, developed over a series of meetings with the client under the guidance of a Certified Financial Planner, is critical to clients' financial success.

"We look at anything and everything relevant to the client's financial situation, including life and long-term-care insurance, a possible need down the road for nursing home care or assisted living, any potential sources of income such as pensions and Social Security, and any properties," Benway says. An investment policy statement that reflects the client's resources, goals, objectives and risk tolerance guides every investment decision and recommendation.

"This locally based firm was built on integrity, solid values and an unparalleled commitment to excellence, and we work hard every day to earn and maintain our clients' trust," Benway says. "Every client enjoys the highest level of professional concierge-type service. We invite you to experience the difference."

Measured Wealth Private Client Group

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