Atlas Private Wealth Management has an active approach to investing in addition to its investments in Mutual Funds & ETFs

Leadership

- Gregory R. Britton, ChFC, CLU, CASL, President & CEO
- 30+ Employees, including a deep bench of advisors

THE CLIMB IS
MORE REWARDING
WITH THE RIGHT PARTNER

ATLAS IS ACTIVELY SEARCHING

for high-quality individuals, teams and firms
to join its expanding business

- Flexibility in investment / client approach
- Ability to leverage growth resources, support and the brand of an extremely successful IRA associated with Focus
- Ability to address succession planning for clients and founders
- Fee-based advisors with clean compliance records
- Can service anywhere in the US
- Upfront liquidity potential

Atlas Private Wealth Management provides Investment Management (investment minimum is $1OOK) Services to mass affluent clients. Atlas also offers a two-tiered financial planning system. Clients can opt for either the Basic or the Comprehensive financial planning capabilities.

Basic Financial Planning consists of generating a standard financial plan including basic tax and estate planning. This includes an annual review of the client's plan, offering a chance to focus on recent changes to the client's situation.

Comprehensive Financial Planning on the other hand evaluates the client's total financial situation and provides an integrated series of recommendations. This service includes 2-3 meetings a year.

ASSETS UNDER MANAGEMENT: $1 billion

CUSTODIANS: Fidelity, Charles Schwab

LOCATIONS: Albany, NY

Atlas
PRIVATE WEALTH MANAGEMENT

800.432.7447
partners@atlaspwm.com
www.atlaspwm.com