PRIVATE WEALTH MANAGEMENT

OVERVIEW

Palisade's mission is to safeguard and enhance personal wealth. We provide comprehensive investment management services tailored to meet each client's unique needs. We provide our clients the highest quality service, delivered by qualified, experienced professionals.

HISTORY AND INVESTMENT PHILOSOPHY

At Palisade, we have a tradition of growing and preserving assets - our experience with personal wealth management precedes the founding of Palisade. We currently enjoy relationships with the third generation of some of our initial clients.

Palisade does not restrict our personal wealth portfolios by style or market capitalization. We invest in companies where opportunity and value present themselves. Our goal is to minimize the downside risk while seeking consistent and superior returns (high alpha/low beta).

PROCESS

We work closely with each client to develop and implement a comprehensive investment program. Assessing current financial status and understanding a client's needs and objectives is our starting point. As a client's primary advisor, we will coordinate and work as a team with attorneys, accountants and other professionals to implement an effective investment program.

We work with clients to develop a wealth management plan, anticipating the impact of life changes and developing an action plan to respond to them.

We provide clients with a broad range of services, including:

- Investment planning and asset management

- Coordinating investment planning with a client's estate and tax plans

- Matching investment goals for education needs and wealth transfer