

YOUR TRUSTED FIDELITY PARTNER

Crestwood Advisors has been a trusted partner to Fidelity Investments for more than two decades, providing custom wealth management services to high-net-worth and ultra-high-net-worth individuals and families. With Crestwood, you'll have confidence knowing that your clients' needs will be addressed through our extensive capabilities, collaborative approach, and focus on delivering real client impact.

WORKING WITH YOU

Experience working with a partner who provides:



Experienced Resources Dedicated to the Fidelity Relationship



A Seamless Client Transition Process



Capabilities to Handle and Simplify the Complex Needs of Your Clients



A Steadfast Commitment to Promoting the Fidelity Brand

OUR PARTNERSHIP PROCESS

We collaborate with you, employing a structured engagement process to:

1

Facilitate an initial discussion regarding the client opportunity, background, and next steps

2

Coordinate a meeting to include you and the prospective client at a time and location that suits the client circumstances

3

Deliver a comprehensive wealth management proposal including investing and financial planning observations and recommendations

4

Enhance the relationship through deep client engagement, open communication, and continuous feedback to you



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