Your choice for
successful investing.

Schenck
Investment Solutions LLC

schencksolutions.com
800-236-2246

An approach to investing designed around you.

Your investments are your future. At Schenck Investment Solutions, our team will give you the guidance you need to make the right choices—to plan for and protect your present and future assets.

Schenck
Investment Solutions LLC

What sets us apart? With Schenck, you'll benefit from:

Independent & Objective Advice

At Schenck Investment Solutions, you'll receive independent advice since we do not have in-house investment products. This allows us the flexibility to make the selections that are best for your unique situation:

- common stocks
- preferred stocks
- equity mutual funds
- closed end funds
- government bonds
- corporate bonds
- municipal bonds
- bond funds
- money market funds
- certificates of deposit

Our decisions will be guided by the quality, risk level, and cost-effectiveness of each option.

Coordination Between Tax & Financial Planning

As tax laws related to investments and retirement planning change, it's critical to understand the implications. Our integrated approach to investment management means our team works closely with our trust, estate, and tax planning professionals to provide you with a complete financial planning perspective.

A History of Growth & Success

Since Schenck Business Solutions was founded in 1930, it has been our goal to be our clients' financial advisor of choice. Schenck Investment Solutions' strong infrastructure, tools, and technology—led by our team of talented financial professionals—are a key part of this goal.

Strong Industry Partners

Our custodial services are handled through Charles Schwab, a leading provider of financial services. This relationship provides us with a wealth of information, tools, and support services. We base our research and analysis on trusted and proven resources like Goldman Sachs, Standard & Poor's, Moody's, Value Line, Morningstar and more.

An Experienced Team

Our investment managers have years of experience managing clients' assets, and have developed a time-tested approach to helping clients meet their financial and retirement objectives.

Serving Both Individuals & Businesses

As a comprehensive financial solutions provider, we provide asset management services for a wide range of account types:

- individuals
- trusts
- IRAs
- IRA rollovers
- retirement plans
- corporate accounts
- limited partnerships

Our Commitment to You

We will work toward your investment success through effective asset allocation, strong products, portfolio review, and performance monitoring. We will work to understand your needs and help to reach your goals. We will keep you informed of your progress along the way with quarterly reports showing account holdings, investment returns, and updates on the general market and economic conditions.

Schenck Investment Solutions
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