

2009 LEADING PROVIDERS

Wealth Managers

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Gerald Butrimovitz Wealth Advisory Gerald Butrimovitz, Ph.D., CFP®

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Providing comprehensive, customized & values-based financial planning services to assist clients in achieving life goals. Taking pride in a proprietary asset allocation model to enhance a client-centric relationship.

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The Excelcia team specializes in providing comprehensive wealth management services for business owners, executives and other high net worth individuals. Affiliated entity to Excelcia Financial Group.

Monetary Management Corporation

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Monetary Management Corporation has attracted attention by substantially outperforming the market and has recently re-introduced a market neutral strategy with outstanding returns.

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Praetorian Guard



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877-474-9600 || www.praetorianguard.biz

Praetorian Guard provides comprehensive wealth management services for individuals, business owners and families. They specialize in coordinating your financial situation with your other professional advisors.

Legacy Wealth Advisors, LLC

2001 Gateway Place
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San Jose, CA 95110
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Legacy Wealth Advisors provides a comprehensive suite of wealth management services including active investment strategies to high net worth individuals, families and institutions.

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