

Royal Asset Managers has a roster of clients that includes business owners, executives, professionals, retired couples, as well as individual men and women. Our clients' personal and work histories are diverse and their personal financial situations are at various tiers. What our clients share in common is the desire to work with an experienced independent advisor who consistently performs service and results. Regardless of asset size each client is important to RAM and benefits from an unmatched attention to detail. We are happy to serve clients who may be just starting out or have established significant personal net worth.

Established Wealth Clients: These individuals have accumulated significant net worth through a variety of methods or events in their lives. With secure levels of assets their financial confidence is much higher than it is for others but the magnitude of their wealth requires more intense portfolio oversight. Portfolios with broader diversification that might include analysis of possible alternative investments are not uncommon and financial planning problems may be more focused on tax & estate planning and charitable giving.

Affluent Investor Class: These are individuals who may still be accumulating assets through their hard work or they have entered retirement with enough assets to maintain a comfortable lifestyle. Financial planning and budgeting remain vital to their financial security and implementation of a customized investment strategy is the central need. This is the core of RAM's client base.

Accumulation Phase and Early Stage: Working professionals and others who remain quite a few years from retirement and may not have significant liquid assets but need help to ensure they are on the right course for future success. They may have some assets to invest in addition to their company retirement plan. They need help to chart a course for financial security.

Asking how many clients your advisor serves and the average size of a relationship are important questions when you're choosing a financial partner. It gives you some indication about whether the advisor is a good match for you and vice versa.