BlueLine | Wealth Advisors

Investment Planning & Wealth Management


PATIENCE IS ONE OF THE MOST VALUABLE ATTRIBUTES TO INVESTING

Independence & Objective Advice

BlueLine Wealth Advisors is an independent investment practice located in Scituate, MA.

As an independent firm, we have the freedom to offer access to a wide range of investment choices. We have a comprehensive suite of investment management services and platforms for individuals, families, and business owners. We don’t promise quick answers or easy solutions. Instead, we offer a prudent process with a long-term focus that allows you to pursue life's most important goals.

At Blueline Wealth Advisors, we select the investment strategies that are right for you and your family. We take the time to examine your current financial situation and build a realistic plan to work toward your financial goals. We are strategy and outcome focused.

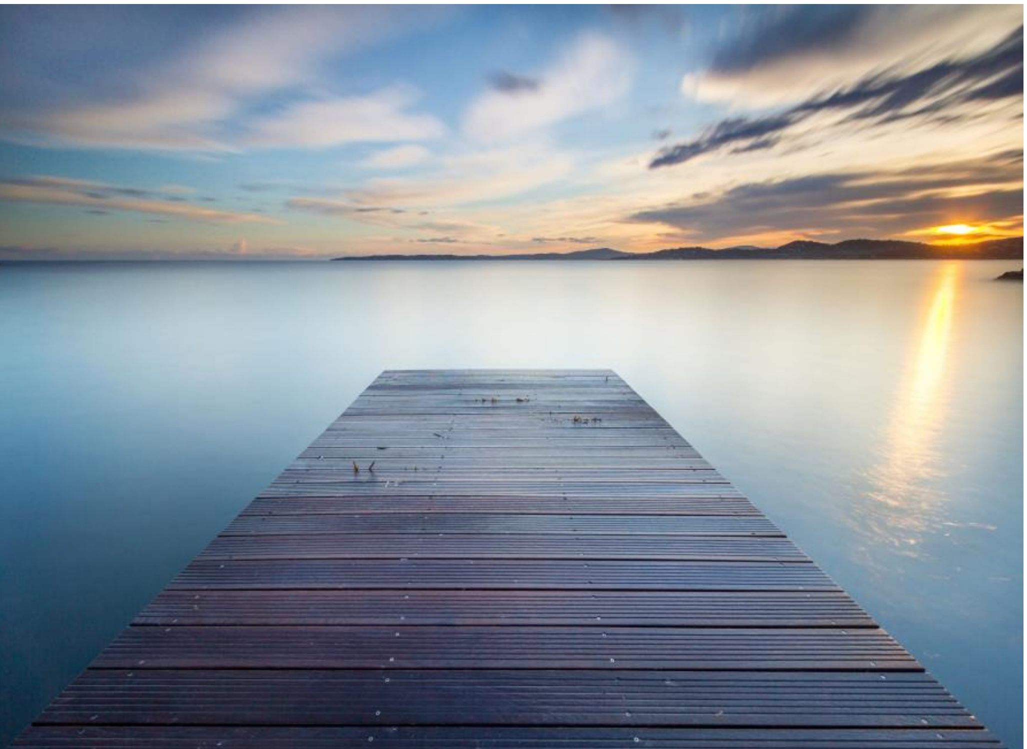
We are committed to providing you with a disciplined approach to investment selection and portfolio construction, supporting you with the structure needed to help you succeed.

- *Focus on the long term*
- *Careful investment selection*
- *Manage risk*
- *Diligent oversight*

Personal Wealth Management

Life isn't static, and your financial plan shouldn't be either. It needs to be flexible enough to meet unexpected challenges but disciplined enough to maintain a long-term vision that encompasses all of your financial goals. It should include strategies for funding your children's education, investing for the retirement of your dreams, and the ability to take advantage of opportunities when they arise.

- *Portfolio construction & management*
- *Manage risk through prudent investment strategies*
- *Wealth accumulation & distribution*
- *Plan for major expenses*
- *Invest for retirement*
- *Simplify your financial recordkeeping*



- *Stocks*
- *Bonds*
- *Mutual funds*
- *ETFs*
- *IRAs*
- *Roth IRAs*
- *College 529 plans*

Client Focused

BlueLine Wealth Advisors firmly believes trust is the cornerstone of our practice.

Our clients trust and value our advice. We prioritize our clients' interests above all else.

We work extensively with individuals and families to bring structure and discipline to the wealth management process.

Business Retirement Plans

Providing retirement plan benefits is crucial to attract and retain outstanding employees. At BlueLine Wealth Advisors, we help companies and plan sponsors work toward their retirement plan goals. We understand that you're busy running your business. As a business owner/executive you must effectively:

- *Run your company*
- *Manage expenses*
- *Understand your industry*
- *Manage employees*
- *Service your customers*

We'll make sure your retirement plan matches your organizational goals and helps keep you competitive. We can assist with the following types of retirement plans:

- *401k plans*
- *Safe Harbor 401k plans*
- *SEP (Simplified Employee Pension)*
- *SIMPLE (Savings Incentive Match Plan for Employees)*
- *Profit sharing plans*

Business Retirement Plans

As a plan sponsor and fiduciary, you need to know your plan investments are being properly monitored and maintained. We can help you with:

- *Plan design assistance*
- *Plan review & benchmarking*
- *Employee education*

Your employees need tools and resources to help them effectively work toward their retirement goals and remain educated about their investments. A well-designed retirement plan can help your employees:

- *Invest for the future*
- *Realize tax-deferred growth of investments*
- *Take advantage of the knowledge and experience of your financial professional*

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