Intensely Loyal, Mission Driven

DeDora Capital

What does it take to create a thriving wealth management practice? How do you distinguish yourself in a world full of broker-dealers, wealth advisors, portfolio managers and investment planners?

Financial savvy, education and experience are all essential, of course. And you have to offer high-quality products and services.

But Paul DeDora believes the defining characteristic of his practice, what truly sets DeDora Capital apart from others and the reason it has been so successful, goes beyond asset allocation or estate planning strategies, certifications and years in business, as important as they are.

"We are intensely loyal to our clients," says DeDora, a Certified Financial Planner™ professional, portfolio manager, and the practice's president and founder. "We strive to be remarkable and indispensable to every client, and they quickly learn they can count on us to be there for them whenever, wherever and however they need us. That is one reason the Advisors on our team have industry designations and the administrative team members have a wealth of industry experience."

Comprehensive Wealth Management

The firm offers comprehensive wealth planning to guide financial decisions and invests clients' assets to help build their wealth, whether the goal is to retire comfortably, pass assets to one's heirs as efficiently as possible, fund an education, preserve hard-earned wealth or all of the above.

Paul DeDora

"If it has a dollar sign attached to it, we can probably help," DeDora says. "This includes items as diverse as solar installation cost-benefit analysis, charitable giving, executive compensation, restricted stock options and estate planning strategies."

DeDora and his team use the same investment strategies for their own money as they do for their clients', closely monitoring the progress of each investment. "This means our interests are aligned with those of our clients," he explains. "We have a great personal stake in the outcome of our recommendations."

He notes that he is held to the fiduciary standard when serving clients in an advisory account. "Among other important things, this means the client's best interest comes first – before my best interest or that of my firm or staff."

Mission-Driven and Socially Responsible Strategies

DeDora started the practice with a clear mission: "to make a meaningful difference in the financial lives of our clients and community every single day." This commitment, he says, guides every decision, every client relationship.

"Our clients trust us to protect their interests in even the most complicated, most difficult cases, often in collaboration with their tax advisors and attorneys. And once a client experiences what we do, we find they are just as loyal to us as we are to them."

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> *– Paul DeDora*

In addition, clients who wish to align their investments with their personal values may choose to have their assets invested in a socially responsible strategy. "Conducting Fossil Fuel Divestment analysis, Fossil-free investing, and Socially Responsible Investing are a growing part of what we do," says Financial Advisor William Becker.

DEDORA CAPITAL

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