CERITY PARTNERS®

Firm Overview

Financial Advice *on Your Terms*

No two people or organizations are the same and neither are their financial needs and goals.

That's why at Cerity Partners we're committed to providing objective financial advice and oversight tailored to your unique situation.

Our in-house team of specialists work closely with individuals, families, businesses and nonprofit organizations to understand their financial goals and concerns, then offer comprehensive, customized solutions.

As fiduciaries and stewards of your money, our commitment is to you—nothing else.

Cerity Partners
At A Glance as of 01/01/21

$29 billion AUA

240+ Professionals

National footprint

FT Financial Times Top Financial Advisers 2020

Award-winning service

Individuals and Families

Comprehensive advice for your entire financial life.

Spend less time managing your wealth and more time doing what you enjoy. Our holistic approach provides all the support you need under one roof:

- Estate and gift planning
- Financial planning and cash flow analysis
- Tax planning and preparation
- Investment management
- Risk management and insurance planning
- Family office and business owner advisory services
- Marital and cross-border financial planning

Businesses

Unparalleled support for your executives & employees.

It's no secret financial stress affects productivity. Our services help your employees take control of their financial lives and make the most of their wealth so they can focus on their work and your strategic goals:

- Executive financial counseling
- Financial wellness coaching
- Defined contribution consulting
- Defined benefit consulting
- Nonqualified plan management
- Beneficiary counseling

Nonprofit Organizations

Proven guidance to perpetuate your mission.

The preservation and growth of your organization's financial resources are essential to your mission. Our extensive financial oversight helps ensure your noble work continues for generations to come:

- Investment consulting
- Financial administration
- Outsourced Chief Investment office

Experience a *better* approach to financial service.

All the experts. One point of contact. Comprehensive financial advice, tailored to you.

Visit ceritypartners.com to learn more.

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