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—HPM Partners Investment Committee, Douglas Nardi, Chief Investment Officer

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Minimum Net Worth Requirement
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Largest Client Net Worth
Confidential

Financial Services Experience
Extensive

Compensation Method
Fee based

Custodians for Investor Assets
Fidelity, Charles Schwab, et al.

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Investment advisory and consulting, executive wealth planning, tax planning and compliance, private capital management, retirement plan and business advisory services

Team Credentials
JD, MBA, CPA, CFA, CFP, AIF, CIMA

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