Why Is Exchange a Boutique Firm?

By: Exchange Capital Management

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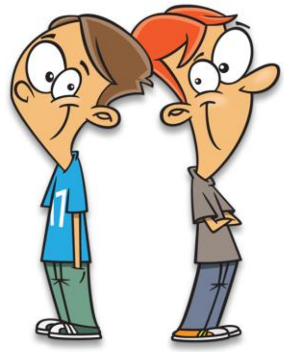

When you hear the word boutique, you might think of a few words. Perhaps you think of small, personal, or sophisticated. For Exchange, it means a whole lot more.

Our definition of boutique is not tied to our size but tied to our service. We strive to provide intimate, personal engagements for our clients. We want to make sure you feel comfortable with your financial advisor, and the team you entrust to manage your finances. Many of us have developed friendships with our clients that we want to preserve regardless of the size of our firm. That is just one of many benefits a boutique firm can offer you, but there are many reasons clients feel more comfortable with this style of firm.

It's Consistent

When you are a client at Exchange, you will establish a relationship with your lead advisor and support team. When you have questions, you're never going to be caught in an endless cycle of phone menus and extensions. When you call us, an actual human being, with knowledge of your accounts will answer. One of our goals at Exchange is for our clients to establish relationships with our advisors, planners, client service administrators, and portfolio management team.

At Exchange, you gain access to an ensemble of professionals, rather than just one advisor. If your financial advisor retires someday, you can feel comfortable knowing that your assets are still in the hands of a capable advisor that has already been helping to manage your financial plan.

At bigger firms that utilize call centers, you can't develop that personalized consistency as easily. You will talk to a different person every time you call with uncertain results.

It’s Valuable

Personal relationships provide value. Establishing a relationship with your advisor helps build trust when it comes to the management of your assets. If you value our relationship and trust that we want to reach your goals, you will stress less and focus your time on more enjoyable matters. Whether you are planning for retirement or retired, time is valuable. Having a firm and people at that firm that know you, understand where you’ve been, where you are, and where you are trying to go is valuable as well.

After having a conversation with your advisor, you should feel confident they will do their work with your best interest at heart. If you don’t have a relationship with your advisor or the firm, will you feel as confident that they will do it correctly or timely?

It’s Personalized

When we have the chance to develop a relationship with you, we start to understand what your goals are. This reflects in the advice we give you; it is personalized to you. We can work together to reach your goals and make sure you feel comfortable with the work that we do.

We can easily set up in-person, phone, or virtual meetings to inform you about any changes in your account or financial plan. It also establishes two-way communication for you to discuss any changes in goals, income, or substantial life changes that can affect your financial plan with us. With a boutique outlook on financial planning, we can easily work through your needs.

The Bottom Line

Exchange strives to maintain our definition of a boutique firm, regardless of size. We pride ourselves on the relationships we have with our clients, and the quality of service we provide. Consider scheduling a meeting with us to discuss what a boutique firm could do for you.