How Does Exchange Operate as an Ensemble?

By: Exchange Capital Management

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At Exchange, we have five departments that contribute to a smooth operation. We differentiate these departments by the value they add to the ensemble. It is important to note we are not a silo firm. Each section works together, contributing to the ensemble, and helping us best serve you and your needs.

Grand Central

Grand Central are the welcoming faces that greet you at the door when you come in for a meeting. They're the first voice you'll hear on the phone when you give us a call. Our Grand Central team are the service providers, focused on making sure your accounts run smoothly. This includes establishing accounts, changing beneficiaries, moving money, working with your custodian, and the many other recurring actions that arise.

The Bridge

The Bridge functions as Exchange's support staff, especially for our lead advisors. Their main task is to analyze financial information that comes in from our clients. They look at tax documents, pay stubs, current accounts, and investments to make sure we have a comprehensive picture of your finances. They are the behind-the-scenes team, doing the legwork to develop and maintain your financial plan.

Eastern Market

Eastern Market consists of our financial advisors. This is the department that plans around your goals and time constraints. They take what The Bridge has researched and analyzed and develop a financial plan tailored to your unique circumstances. They take into consideration exactly what you need because as your advisor, their goal is to understand and know what you want.

West Wing

The West Wing is our portfolio management team. They take the building blocks from your financial plan and use them to guide investment decisions. They also diligently research the markets and investment vehicles to make data-backed decisions in your portfolio. Not every firm has a portfolio management team, but this team allows us to dedicate real time and energy into managing a customized portfolio tailored to your goals.

Newsroom

The Newsroom is where our advocates work. Their number one priority is to market to our community and our clients. They let the public know what we do and how we can help you. Additionally, they place a focus on becoming thought leaders in our field. They are the megaphone, allowing us to build educational resources and informative guides that help break down complex financial topics and build awareness. Many of these guides can be found in the WealthyStreet Academy.

The Bottom Line

Exchange is built on the idea of an ensemble. All of our departments play into one another — one helps the other. Without one, the team crumbles. To learn more about how our operation can guide your financial path, give us a call.