Mayport Wealth Management – Financial Advisory Listing for White Coat Investor

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Firm name: Mayport Wealth Management

Website: mayport.com

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Company overview:

Mayport is a Boston-based, fee-only fiduciary advisor. Founder Adam Grossman is a Chartered Financial Analyst and earned an MBA from the MIT Sloan School.

Mayport was founded on the belief that quality investment advice can be delivered for a reasonable, flat fee rather than the 1%-of-assets most firms charge. Mayport's mission is to create for you a financial plan that will meet both your short-term and long-term goals so that you can focus on your career and your family, with the comfort of knowing that you have a solid plan in place.

Our investment approach emphasizes simplicity, low-cost and tax-sensitivity.

Where located and do you work with people long distance?

Mayport is located in Boston, MA, very close to the hospitals. Mayport works with clients locally and across the country.

Services:

Mayport offers two service options:

Comprehensive Wealth Management includes in-depth financial planning and investment management:

- **Financial plan:** Mayport starts by meeting with you to understand your goals then prepares a detailed plan to work toward those goals.

- **Investment management:** We develop an investment strategy for each of your accounts then manage your accounts according to this strategy.
- **Retirement plan guidance:** For your 401(k) or 403(b), Mayport will help you choose a set of funds that fits your plan and keeps your costs low.
- **Financial consultation:** If business or investment opportunities are presented to you, we can help you analyze them. And, Mayport is available to answer other financial questions that may come up. For example: How should I balance student loan payments against savings, how much should I save in 529 accounts, or can I afford a particular house without jeopardizing my retirement plan?
- **Web portal:** To help you monitor progress toward your goals, Mayport's web portal provides a consolidated view of your entire financial picture in one organized location.
- **Cost:** The fee for this service normally ranges between $5,000 and $20,000 per year, based on the complexity of your needs. This usually results in a significant savings compared to traditional firms that charge 1% of your assets.

Financial Planning and Investment Consulting provides in-depth financial planning and guidance on your investments.

- **Financial plan:** Mayport starts by meeting with you to understand your goals then prepares a detailed plan to work toward those goals.
- **Investment guidance:** We develop an investment strategy for each of your accounts then provide you with guidance so you can implement it in your accounts
- **Retirement plan guidance:** For your 401(k) or 403(b), Mayport will help you choose a set of funds that fits your plan and keeps your costs low.
- **Financial consultation:** If business or investment opportunities are presented to you, we can help you analyze them. And, Mayport is available to answer other financial questions that may come up. For example: How should I balance student loan payments against savings, how much should I save in 529 accounts, or can I afford a particular house without jeopardizing my retirement plan?
- **Cost:** $275 per hour, with an initial three-hour minimum for new client relationships.