

## Wealth & Legacy | *Wealth Management*



Pictured: Steven M. DiGregorio, President, Sr. Portfolio Manager, and Ashley Squillace, Financial Advisor



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### FINANCIAL PLANNING AND WEALTH MANAGEMENT

Compass Asset Management Group, LLC is a private financial planning and wealth management firm delivering tailored investment strategies to select clients. Their specialized wealth managers serve executives, directors, and entrepreneurs across the United States. Pairing team members' expertise with a thorough understanding of clients' needs, they prepare individuals to live a healthier, wealthier lifestyle. In this way, Compass helps clients define and achieve their unique financial "true north."

After the turbulent markets of the early 2000s, founder and CEO Steven DiGregorio knew clients needed a firm rooted in transparent, client-centric financial advice combined with prudent, analysis-driven investment strategies. He launched Compass Asset Management Group in 2009 with the core belief that the client's best interests come above all else. Since then, he and his team have crafted an extraordinary client experience. They provide the personal attention and agility of a small firm, backed by the depth of industry experience, technology, and research of a Wall Street giant.

The company has received numerous accolades, including eight consecutive years listed as a Five Star Wealth Manager in the *Hudson Valley* magazine. *Forbes* also named them a Top New York Financial firm in 2015. One reason for their continued success is their commitment to educating and empowering clients. Their informative video series, Money Monday, explains topics such as tax leveraged planning, optimizing employer benefit plans, and how small business owners can transition into retirement effectively. Their free blog also provides insight into specialized financial situations. Both resources embody their dedication to a transparent advisory process and consistent communication with clients.

Compass Asset Management Group is comprised of a team of financial experts, each with specialized industry knowledge. Together, they provide a variety of financial planning and wealth management services, including retirement planning, investment management, college funding, executive compensation, business succession planning, and insurance risk and mitigation. They also advise on trusts and estate planning, as well as philanthropic and charitable interests.