

As Seen In
Bloomberg Businessweek, Fortune & Money

Building Wealth in Cincinnati

A LEGACY OF EXPERTISE



A CORNERSTONE OF THE INVESTMENT INDUSTRY AND THE CINCINNATI COMMUNITY FOR OVER 100 YEARS.

With a precision-based, unwavering focus on clients' financial objectives, Bartlett & Co. offers integrity, objectivity, and unmatched service.

"As a registered investment advisor, we provide an unbiased approach to wealth management," says Executive Committee Member and Investment Advisor Terry Kelly. "We uphold the fiduciary standard of making recommendations that are foremost in clients' best interests."

"Our own interests are aligned with those of our clients, and we have a well-disciplined process to ensure that we're managing and meeting expectations," adds President and CEO Kelley Downing.

CLIENT-CENTRIC, TEAM APPROACH

Every relationship begins with attentive listening. While clients range from individuals and multigenerational families to foundations and businesses,

each receives dedicated, individualized service.

"We never take a cookie-cutter approach. Solutions may be different for every client depending on his or her goals, and we spend a considerable amount of time detailing all options," says Downing.

Important for developing highly customized strategies, face-to-face meetings provide an in-depth understanding of each client's needs. For multigenerational families with members across the U.S., Bartlett advisors use technology as a connection for important face time.

A full support team of seasoned research staff, client relationship associates, and financial planners is dedicated to serving clients. Advisors can tap additional resources and bring them into the relationship to help define creative strategies to meet each client's goals.

PRESERVING, PROTECTING, NURTURING

"As a firm, we've been working to preserve the wealth of our clients during downward trends and help grow assets during upward markets since 1898," says Kelly, "and the tenure of the Bartlett staff is such that they've moved through almost any type of market or economic condition imaginable. That experience is invaluable."

Understanding the hard work that went into accumulating assets, the team seeks less volatile investment opportunities and works to mitigate risk through balance, diversity, and ongoing scrutiny.

"Many of our clients recognize return but have a difficult time addressing risk," Kelly says. "We work with them to define risk tolerance and adjust thinking to a long-term view."

As a financial advocate, Bartlett adds comprehensive financial planning services to work in tandem with investment management. These complimentary services provide clarity when focusing on clients' unique milestones, which may range from retirement to philanthropy to taking care of a parent to sending a grandchild to college or more.

"No matter the goals of our clients, we're committed to working to meet their expectations," says Downing. "We're given a responsibility to manage clients' assets, and we take that to heart."

BARTLETT

OUR GOAL IS REACHING YOURS.
Investment Management. Financial Planning.
Since 1898.

Bartlett & Co. is located at 600 Vine Street, Suite 2100, in Cincinnati, OH.

For more information, call 513-621-4612 or visit bartlett1898.com.

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