Securing a Long Term Trusted Advisor

Securing a long term trusted advisor could very well be the most critical aspect of running a family business. You are 100% focused on running the operations of your company and ensuring its success. However, most business owners lack the experience and bandwidth to handle financial situations outside of the status quo. Bruderman Brothers can provide you with that leverage.

What is a Trusted Advisor?

Someone who Understands Your Business

Your advisor should be well-versed with your company, its operations, and the industry. This will give you an edge with company positioning

An Independent Voice that Can Guide You in Times of Need

Being notified of any risks and being advised on the requisite steps to help mitigate such risks is essential to sustain a business

A Strategic Ally

A trusted advisor will have a deep understanding of your objectives, weigh the options, and advise you on the best approach to reach your goal

Key Considerations

Reliable

For a successful relationship, the advisor should always have the client's interests over their own. A trusted advisor has the credibility and authenticity which lets you depend on them

Sounding Board

Frequently, an advisor works to satisfy the most obvious needs and be a "Yes-man". However, a trusted advisor is one who willingly pushes back and guides the client on an objective basis and will be the voice of reason

A Long Term Relationship

Trustworthiness and integrity are integral when it comes to maintaining a long-term relationship. Meeting deadlines, on-going communications, regular updates are a few signs of an advisors long-term commitment

Introduction to Bruderman Brothers

Who We Are

Bruderman & Co. is a multi-generational, privately held financial services holding company committed to providing its clients with the highest level of service

- Registered Broker Dealer
- Registered Investment Advisor
- Investment Bank
- Merchant Bank
- Insurance

- **Trusted** Long Term Advisor to Family Businesses
- Advising Clients **Since 1879**
- **Professional** Owners and Operators
- Create **Bespoke** Processes for Clients
- Offering A **Holistic** Solution
- **Success Driven** Mindset and Approach

What We Do

Bruderman Brothers is an independent, privately-owned investment bank that serves a diverse clientele and offers a comprehensive approach to advisory services

Bruderman & Co.

- **Private Wealth Management*** ***(Bruderman Asset Management)***
- **Investment Banking*** ***(Bruderman Brothers)***
- **Merchant Banking** ***(Bruderman Enterprises)***

Services

- Strategic Advisory (Sell-side/Buy-side)
- Capital Raising
- Strategic Consulting
- Leadership Recruiting
- Personal Transaction Planning

Our Approach

We strive to accomplish an outcome that is best for a business and its stakeholders. With the vast transactional and operating experience of our senior bankers, we know well that one size does not fit all and understand situation specific factors that motivate and drive our clients to engage in a transaction. We satisfy the needs of ultra-high-net-worth individuals and closely held businesses, offering trusted advice drawn from generations of experience.

Contact us

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* Bruderman Brothers LLC is a FINRA registered broker dealer. Additional information available at https://brokercheck.finra.org. Bruderman Asset Management LLC is a registered investment advisor registered with the United States Securities and Exchange Commission. Additional information available at https://www.adviserinfo.sec.gov/.

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