

As featured in

# Money



## LEADERS IN WEALTH MANAGEMENT

Dash Investments is a privately-owned, independent fee-only investment advisor, managing private client accounts for individuals, families and institutions across America.

Founder and CEO, Jonathan Dash, has been profiled by The Wall Street Journal, Barron's and CNBC, as an opinion leader in the investment industry with a track record of creating value for his firm's clients.

The firm's story begins over twenty years ago when a chance meeting between Mr. Dash and legendary investor Warren Buffett sparked a mentorship that would last more than two decades. "Having had the opportunity to see through the eyes of the best has greatly affected me as a professional and given me a truly unique perspective on the industry," said Mr. Dash.

Later branching out on his own, Mr. Dash noticed a gap in private investment management and set out to start an investment firm that could fill that void in a truly unique manner.

Dash Investments has pioneered a full-service approach wherein each

client is granted access to a full suite of built-in financial planning services, delivered by a dedicated Private Financial Advisor. As stated by the firm's Founder and CEO, "We believe in doing everything in our power to help our clients reach their financial goals."

In addition, each client's portfolio is designed and managed according to their own customized financial plan. In this way, Dash Investments offers a truly personalized investment experience, in which clients are never lumped together and their individual goals always kept in mind.

The clients' portfolios are managed by the members of their Investment Policy Committee. The Committee, headed by Jonathan Dash, has over 60 years combined industry experience and an audited track record illustrating their historical performance. Many firms can put



Dash Investments Founder & CEO, Jonathan Dash

together a financial plan that looks great, but ultimately it's tying that plan together with a proven record of good performance that gets their clients to reach their goals.

Unlike most advisors, Dash Investments serves as a fiduciary, meaning they are legally required to put their client's best interests first. We believe this is why their client retention rate has been nearly 100% since inception.

In a gesture that is wholly in line with the idea of sharing in the client's interests, all primaries of the firm keep a majority of their personal assets invested alongside client investments. This above-and-beyond approach and insistence upon putting the client first are just a few examples of how Dash Investments is redefining asset management.

This is why Dash Investments has been recognized as a national leader in wealth management.



Jonathan Dash (center) with Warren Buffett (left) and Bill Gates (right)