



KENDALL CAPITAL MANAGEMENT

600 Jefferson Plaza, Suite 410, Rockville, MD 20852

301.838.9110 • www.kendallcapital.com

Investors value three things: honesty, unbiased financial advice, and trustworthy, expert opinions. It is difficult to find these three attributes in an investment advisor but not at Kendall Capital Management. Kendall Capital of Rockville, MD was founded in 2005 and provides financial planning, investment management, and wealth management services to the Middle-Class Millionaire. Their clientele are individuals and families who have patiently focused on long-term growth and financial security and in turn have accumulated \$500,000 or more in investments and retirement plans. They also help executors and administrators of Trusts and Retirement Plans by managing investment assets with their fiduciary standard.

Kendall Capital is a fee-only fiduciary firm which means their only source of revenue is the management fee paid by their clients. They do not accept any compensation based on product sales or commissions which allows them to provide unbiased advice, always. When necessary, they'll refer clients to other trusted specialists such as insurance, tax and legal service providers. While many investment firms claim to be "independent" only about 8.4% of all advisors are fee-only as defined by the National Association of Personal Financial Advisors (NAPFA).

In recent years, the public has become more aware of the guidance and support offered by a fee-only fiduciary firm to make important financial decisions at a reasonable cost. Perhaps that's why Kendall Capital's assets under management have nearly tripled in size from \$63 million to over \$175 million and why their clients stay, especially through market down turns.