

# Are You Maximizing Your Relationship with Your Investment Firm?

The investment firm is a multi-faceted organization. When your activity is limited to just one aspect, you could be missing opportunities to augment your financial strategy. Understanding the full suite of financial services available through your investment firm can touch all aspects of your financial life whether you're investing as an individual, family, non-profit, or small business. Discover how time has evolved the investment firm and tailored products and services to meet your needs.

## Decades Ago

At its advent, wealth management consisted of providing brokerage services to clients for access to publicly traded exchanges to purchase individual stocks, bonds, and eventually mutual funds.



Brokerage Services

## Yesterday

Services later expanded to include investment management solutions through brokerage services. In addition to asset allocation, services expanded to include cash management solutions (such as check writing, debit cards, and margin services)



## Today

Today, investment management is still the core of wealth management. Once the entire focus, it is now just a piece of ever-increasing service platform that also includes asset allocation, cash management solutions, access to alternative investments, insurance, private banking services, philanthropy solutions, and a host of tailored lending solutions.



As an investment management and advisory firm, Detalus Advisors serves a host of clients ranging from community banks and insurance companies to charitable organizations, individuals, and families. Contact us to learn more about our full range of services and how we can serve your wealth management needs.