"I really enjoy helping clients towards their retirement goals and dreams'. I wake up with a purpose every morning; to help clients find solutions."

Our Mission

Know our clients well...Anticipate their needs...And exceed their expectations...

Clients at Mahoney Asset Management receive:

Client Services

- Our ability to discern clients' investing personalities and set up appropriate investment vehicles
- Our focus on assisting our clients plan for and manage their retirement
- Our experience in understanding market cycles
- Our attention to clients' needs and our prompt responses to all inquiries
- Our commitment to meet with and/or telephone each client on a regular basis
- Our coordination of services with our clients' accountants and attorneys
- Our partners will help assess and review your insurance needs

Information and Research

- Our weekly email updates on specific areas of the market
- Our quarterly newsletter *The Smart Investor* with articles on investing trends
- Our quarterly newsletter *Lifestyle Retirement* which focuses on the issues affecting those approaching or in their retirement years
- Our website, Mahoney Asset Management, which provides articles of interest, financial calculators and a learning center
- Our dedication to educating ourselves and our clients through in-house and offsite seminars and special mailings
- Our desire to share what we've learned over the years through the publication of two books by Ken Mahoney - *Now What: A Guide to Retirement During Volatile Times* and *Investing from Within: A Story of Understanding Your Investment Personality*

Comprehensive Investing, Analysis and Reporting

- Our clearing firm, Legent Clearing, provides client access to accounts online, easy to read monthly statements and financial reporting
- Our use of Thomson One to view real time market activity, to execute trades and to conduct research
- Our access to state of the art technology including Morningstar and Bloomberg

Mahoney Asset Management

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