



Ballast

OPTIMIZED PLANNING & FINANCIAL MANAGEMENT

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ABOUT US

Ballast is a boutique, independent, and employee-owned financial planning and investment management firm. With a deep and thorough understanding of each client's financial picture and life's goals, Ballast develops bespoke, creative solutions to optimize the financial lives of its clients.

MISSION

To provide a balanced and purposeful perspective to wealth management. To guide with honed expertise, responsible stewardship, and steady refinement to make an impact across generations, through storms and calm seas.

VISION

Since our founding, our vision remains steadfast: build a team that we would want to take care of our own families.

WHO WE SERVE

- + Business Owners
- + Physicians + Dentists
- + High-Income Earners
- + Retirees/Soon-to-be Retirees
- + Trusts/Legacy/High Net Worth

CORE VALUES

- + Problem Solvers
- + Team-Based Approach
- + Proactive Guidance
- + Accountability Partner
- + Clients First
- + Civically Involved
- + Thought Leaders

SERVICES WE OFFER

- + Financial Planning
- + Investment Management
- + Personalized Advice
- + Personal CFO
- + Financial Advocate

WE WILL...

- + Serve as your Personal CFO
- + Promote Financial Confidence
- + Develop Creative Solutions
- + Continually Educate Ourselves and Our Clients
- + Be Your Accountability Partner

OUR CLIENTS

More than \$462,000,000 Assets Under Management*

Average Household Account = \$1,224,845*

378 Clients/Households*

*as of 3/9/2023

OUR TEAM

- + John Boardman (CFP®)
Founder/CEO
- + Andy Reynolds (CFP®, MBA)
Partner, COO
- + Brian Burton (CFP®)
Partner, Director of Portfolio Strategy
- + Cameron Hamilton (CFP®, MBA)
Partner, Director of Portfolio Strategy
- + Frank Yozwiak (CFP®, J.D., LL.M.)
Director of Estate Planning & Tax

12 Total Employees