Why Clients Choose Alden

alden
INVESTMENT GROUP

Category	Alden Investment Group	Traditional Wirehouses	Traditional RIAs	Self-Directed / DIY Investing
Client Experience	✓ Personalized, relationship-driven wealth management experience	✗ Inventory and quota driven.	✗ Standardized model portfolios.	✗ Self-directed.
Planning Style	✓ Integrated, education-first planning enhanced by governance and discipline.	✗ Planning available but is product-driven.	✗ Limited or self-managed planning.	✗ Limited by client knowledge.
Investment Approach	✓ Open architecture with a wide range of conventional and alternative solutions	✗ Suitability of inventory for age and time horizon.	✗ Limited access to investments.	✗ Self-selected investments.
Access to Specialists	✓ Access across alternatives, bonds, estate planning, private placements.	✗ Internal product representives.	✗ Limited pool of specialists.	✗ None.
Technology & Reporting	✓ Modern digital tools with streamlined reporting and user-friendly interface.	✗ Basic monthly statement generation.	✗ Monthly statement generation.	✗ Limited reporting.
Client and Advisor Alignment	✓ Approach designed around client goals and education.	✗ Purely transactional.	✗ Governed by investment committees and standardized models.	✗ Independence priotized over performance.
Service Model	✓ Active monitoring with strategic refinement and client engagement.	✗ Advisor bandwidth may be limited.	✗ Self-service unless additional fees paid.	✗ "Free trading" comes at a higher cost to client.
Holistic Wealth Strategy	✓ Strategic coordination of estate, tax, retirement, and legacy wealth architecture.	✗ Services are limited.	✗ Client must request.	✗ None.