We worry about your money so you don't have to

Who We Are:

Walnut Hill Advisors, LLC, a Massachusetts Registered Investment Adviser in Medford, MA, offers comprehensive financial planning and investment management services for every stage of life. We serve individual clients, small business owners, charitable funds and trust accounts.

Our Vision:

Walnut Hill Advisors, LLC plans beyond your present financial situation to align your life-style and beliefs with your financial planning strategy: *Value-Based Financial Planning®.* We encourage our clients to consider all their needs as factors for a customized financial plan.

Competitive Advantage:

Walnut Hill Advisors, LLC does not follow the mainstream formulas of the financial industry. We relish independent thought and analysis to uncover superior financial products and investment ideas for our clients and we do not assign your account to third-party planners, graduate students or interns.

Our advisers have decades of experience forged under the trials of multiple economic conditions. Should the markets turn in either direction, they will take action to keep you on track!

By weighing the risk of loss of principal against the reward for gain, our team can help provide you with a better chance of success. You deserve only the finest talent a company has to offer, and we deliver! Our advisers are passionate professionals, and we attract the best and brightest.

At Walnut Hill Advisors, LLC, we do not hold your money, we hold your hand, so that you may achieve the financial future and happiness you desire.

Services We Offer:

- Comprehensive, Value-based Financial Planning
  (Includes: *Retirement savings & income estimation, investment management, health & life insurance planning, tax implications, cash flow & debt management, etc.*)
- Wealth Accumulation and Preservation Strategies
- Pre-Retirement Planning
- Retirement Downsizing Planning (*How to use your home's value to improve your retirement*)
- Investment Management for Charitable Funds
- Educational Savings Strategies

Call us and make an appointment for your FREE consultation meeting: 781.393.0021
or visit us at www.walnuthilladvisorsllc.com

Version B1.0 Beta

Professional Biographies:

Christopher Grande, Founder and Principal

After 18 years of working with various clients, Chris knows what people need to help them align their finances to their goals and values. He recognizes that thinking one way about your money but going in another direction causes incongruence. As an experienced professional, Chris can structure simple or complex plans that ensure his clients optimize their quality of life.

Chris holds a Master's degree in Investment Management from Boston University and a Bachelor of Science degree in history and economics from Tufts University. He holds the RMA designation with the Retirement Income Industry Association (RIIA).

Alfred L. Angelici, Managing Director

After serving the past 14 years at Fidelity Investment's Private Equity investment management arm, Devonshire Investors, LLC, and its fund management and research arm, FMR Co., Alfred joined Walnut Hill Advisors, LLC in 2012.

At Devonshire, Alfred gained invaluable exposure into global businesses spread across the continents of Europe, Asia, North Africa, and North America. Devonshire manages a portfolio of approximately $6 Billion for Fidelity.

Since 2005, Alfred has served as chief investment officer for a private trust where his duties included portfolio construction, and securities research and selection.

Alfred holds a Master's degree in Investment Management from Boston University, a Bachelor of Science degree in Operations Management from Northeastern University, and a Bachelor of Science in Business Administration degree from Boston University.

For a FREE copy of our most current ADV business disclosure form, please submit a request through our website at www.walnuthilladvisorsllc.com or call us at 781.393.0021 and we will mail one to you.

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