



## SAMUEL M. LEKITES

ASSOCIATE ADVISOR

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☎ 410-213-7185

As an Associate Advisor Sam works closely with the firm's Investment Advisors to develop investment policies, monitor clients' asset allocations, rebalancing portfolios, recommending trades, monitoring cash values for investment opportunities, and assisting with the creation of financial plans.

Outside of work Sam enjoys going to the gym, watching sports and spending time with his family.

### AREAS OF PRACTICE

- Asset Allocation and Portfolio Design
- Client Services
- Compliance
- Comprehensive Financial Planning
- Investment Management
- Trading

### EDUCATION

- B.S. in Finance
- University of Maryland, College Park, Maryland

### CERTIFICATIONS

- Registered Investment Advisor