

CHARTWELL

Guiding Philosophy: Our Purpose and Intentions



IN THE LONG RUN,
THE LONG RUN IS ALL THAT MATTERS

We are most passionate about helping companies achieve their goals.

Why?

Because we know doing so enriches the lives of their owners and employees, enhances the communities where they operate, and, ideally makes the world a little better place to live.

Our mission is to deliver the most creative, unbiased, and responsible solutions in the financial advisory industry.



We lead by looking ahead.

At Chartwell, we measure all possible scenarios against the ultimate arbiter of the bigger picture: time.

In the long run, the long run is all that matters.

Short-term performance as a measure of expertise and success has risen right alongside the growing complexity of modern markets and the increasing speed of life itself. The stakes are high. The pressure is immense. Results matter.

But do they matter at all costs? No. Not by a long shot.

Our focus is on the needs, objectives, and long-term best interests of your business. Always.

Dependable, sustainable, impeccable results—over time—are the only results that consistently and credibly matter. Our unbiased nature of advice proves time and time again that it's not always about the income, but rather it's always about the outcome.

Proactive. Proficient. Productive.

IN A WORD, PROS.

Our core values don't belong on a dusty plaque somewhere. Instead, they are lived each day and strengthened through constant use.

The soul of our firm

We believe skillful, original thinking by talented experts is the single most effective way to gain an advantage over any problem or threat.

We believe passion is the best economic multiplier.

We believe in working beyond conventional wisdom, exploring new ideas, failing fast, and moving forward.

We believe focused determination inspires admiration and loyalty beyond reason.

We believe rampant intellectual curiosity is the key to success.

We believe creating a supportive environment where people can learn, grow, and do the best work of their lives is the best way to remain brave, make a difference, and instill radical optimism throughout the organization—and with our clients.

The skill to adapt, the vision to change.

We have developed a lifetime of relationships whose value cannot be measured by any one metric. Your needs are ever-changing; our solutions are dynamic.

Long-term relationships lead to long-term success

The finance world is extraordinarily complex and challenging, loaded with an infinite number of changing variables.

Focusing on the long run in the face of these obstacles strengthens our relationships. It makes prosperity more rewarding.

We adhere to this focus without compromise. That, plus our principles, allows us to apply more creativity, imagination, and innovation to solving problems over time.

Our guiding philosophy is lived every day. It's the driving force behind our long-lasting business relationships and their sustained success.





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