



J.M. Hartwell L.P.

Investment Counsel Since 1961

Why Choose Hartwell

Tax Efficiency

Private clients have differing investment needs - but a shared goal of minimizing taxes. As long-term investors, we help accomplish effective tax management of clients' investment portfolios.

- We are long-term oriented investors which aids tax efficiency.
- The foundation of wealth creation is letting winners grow undisturbed – successful investments are left in the portfolio to compound their appreciation.
- We often work with professional advisors to minimize the client's total tax liability.