HARBOR | INVESTMENT ADVISORY

Independent. Wealth. Management.

Jennifer Winslow
CFP®, CPWA®, CRPC®, CEPA
Director & Portfolio Manager

Time, energy, knowledge and resources to think deeply about your financial needs.

Expect More from Your Advisor

You are unique. Your needs and values are unique. Your circumstances are unique. And most importantly, your personal and financial goals are unique.

So, why settle for cookie-cutter solutions, model portfolios or proprietary products? At Artisan Wealth Advisory Group, a practice group within Harbor Investment Advisory, we deliver more.

Unique Needs, Tailored Solutions

From day one, I will take the time to understand you, your family and your financial security. My clients rely on me to integrate and organize the various elements of their financial lives.

Based on this deep understanding, I will develop an investment portfolio tailored solely to your circumstances and priorities.

Each investment strategy will consider your financial concerns, from managing risk and protecting wealth to planning for retirement, estate transfer or business succession. And through it all, each strategy will be objective, placing your needs above all else.

Answering Your Key Financial Questions

- How do I stay on track as interest rates change?
- What is the after-tax return on my investment portfolio?
- What rate of return will maintain my retirement standard of living?
- How do I protect my equity portfolio against downside market volatility?

Artisan Wealth Management Process

Your custom investment strategies will stem from your distinct goals and various advanced income analyses, such as cash flow forecasting, stock option evaluation, retirement income planning and statistical and retirement planning analyses.

Protecting Your Assets

The Artisan Wealth Management Process provides comprehensive risk management, protecting your assets via insurance coverage analyses, annuities assessment, corporate trustee coordination, alternative investments, historical drawdown analysis and more.

Passing on Your Wealth

Recognizing that every family and each generation is different, I will perform a detailed wealth transfer examination, including estate planning, charitable gift planning, legacy planning, asset-titling review and complex trusts.

Informed by Insight

With a specialty in advising high-net-worth individuals, executives, business owners and transitional entrepreneurs, I have the full spectrum of insight needed to craft sound investment strategies.

My career in wealth management began in 2007 following 15 years in corporate banking as an analyst and lending executive. Prior to Harbor Investment Advisory, I was a Vice President at Morgan Stanley.

In addition to having an MBA in Finance and B.S. in Management from Lebanon Valley College, I am Series 3 commodities licensed.

Using a thoughtful, hands-on approach, I will work with you to create a custom, tax-efficient investment strategy—not a model portfolio.

Artisan Wealth Advisory Group





Contact Jennifer Winslow at
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