M. Brown & Associates, Ltd.

Planning. Problem Solving. Partnerships

At M. Brown & Associates, we simplify the complexities of your financial life.

By leveraging our team's diverse and objective perspective, investors gain a unique advantage in securing their financial future. "We build relationships on trust and integrity," says Mark Brown, President and Principal of the firm. "Our team-driven approach enables our advisors to truly know our clients, their values, and their goals."

To strengthen the full picture of your financial life, we believe effective planning extends beyond investments alone. With over 90 years of combined industry experience, our team specializes in a spectrum of financial disciplines, from investment management and retirement strategies, to trust and estate planning, solutions for business owners, education planning, and more.

"Our two, in-house investment managers provide clients with multiple styles of investing," says Greg Bruno, CFP® and lead money manager of the firm. We use institutional level mutual funds and ETFs to further reduce the cost of the portfolio.

As a fully independent firm, we keep our clients' best interests at the heart of everything we do. "With our team, it's about process, not just products," says Charles Brown, veteran investment manager of the firm. "Our client commitment drives us to craft truly customized strategies."

In addition to working with individual investors, we also partner with small business owners. Whether you're seeking to reward and retain employees or improve retirement plans, we can help you save time and money while empowering you to stay focused on growing your business.

Beyond our traditional financial planning services, we can assist you and your family in a variety of ways. We have sources or access to lawyers and CPAs for assistance with estate and tax planning. We also have sources or access to college and student loan experts who help high school students select the right school to accomplish their dreams. Whether they've already graduated or are still pursuing their degree, these experts can also help them manage their student loans with confidence.

For older clients in need of independent or assisted care, our resident specialist can help you find the best home for your loved ones. They'll even negotiate a contract, pack their belongings, and help them get settled into their new residence.

"Our commitment extends beyond financial problem solving and into the community," says Andy Buttimer, CRPC® and Partner of the firm. M. Brown & Associates is proud to sponsor annual events with numerous charities to help those in need, including Families Helping Families, Gracepointe Church in Naperville and Plainfield, Joliet Jewish Congregation, Bridge Communities–A Chair Affair, and many other organizations.

From individual investors and business owners, to organizations and charities, M. Brown & Associates unites the professional expertise, compassion, and resources to help people succeed. "We're always looking for a special way to help clients," says Mark Brown. "We have a passion for providing solutions for our clients' financial needs."

M BROWN & ASSOCIATES
INVESTMENT MANAGEMENT SERVICES
CREATING AND PRESERVING WEALTH

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