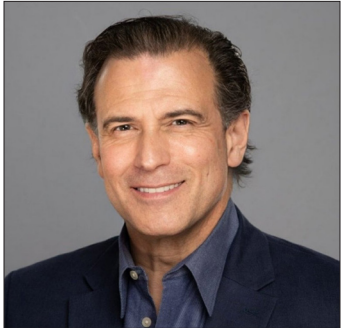


Orlando Maldonado CFP® CIMA®

Senior Managing Director & Partner



Contact Orlando Maldonado

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Orlando can be described as a leader, not a follower, independent in thought and willing to explore creative solutions to help his clients achieve their aspirations. He's a responsible and caring lone wolf—and one who is unafraid to stray from the pack of conventional thought.

Other financial advisors may prefer to invest according to whatever their firm may recommend. Orlando prefers to mine the opinions from major investment houses, top tier registered investment advisory firms (RIAs) and boutiques on topics dealing with estate planning strategies and investments seeking three things: Data, data and more data.

As a Russian proverb says, “Doveryai, no proverya” (Trust, but verify).

The reason why is simple. Data should reveal a financial narrative or the variables that shape market forces; and when placed in Orlando's hands, he believes that data can be transformed into exceptionally well-crafted investment strategies derived by meticulous analysis from informed sources.

An independent thinker, he questions everything as he looks for the root cause of “Why.” He's cognizant that knowledge is transitory in the financial industry—and that keeping an open mind is fundamental to success.

One of the First

Orlando received his degree from Yale University.

From the onset of his career, he was trained in the consultative-style approach to investing.

He learned first-hand from estate planning attorneys, investment management firms, bank trust departments and others—professionals whose expertise and insights are frequently needed to deliver the success his clients' desire.

Since he was on the leading edge at the forefront of this type of educational experience, he believes he can say he's been putting holistic investment plans into place longer than most of his peers.

Orlando has earned the Certified Investment Management Analyst™ (CIMA®) designation and CERTIFIED FINANCIAL PLANNER® certification, which help him simplify complex financial matters, from business succession strategies to tax-minimizing strategies and wealth-transfer strategies for individuals and organizations alike.

Outside the Office

Orlando likes to keep active mentally and physically. When he's not reading a financial report or earnings statement, you'll find him strength training, running or bicycling.

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