

The firm has created strategic alliances with the following trusted partners that help us provide the best possible services for our clients. These partners help us identify solutions that we customize to meet the unique needs of each client. More important, however, is that our partners share our values and our client-centered philosophy.



Brown Robello Capital Management, LLC

Brown Robello Capital Management (BRCM) was founded in May 2001 and is a SEC Registered Investment Advisory (RIA) and an affiliated company with Avisen Securities. BRCM provides private client services to high-net-worth individuals, builds and manages investment portfolios on a fee basis and produces proprietary independent investment research. BRCM may at times use outside money managers to meet specific investment objectives for their clients.



Pershing, LLC (A BNY Mellon Company)

Avisen has partnered with Pershing LLC (A BNY Mellon Company) to provide clearing and execution, a robust technology platform for brokers and back-office, and detailed customer statement reporting.

Pershing LLC is a subsidiary of The Bank of New York with \$25.9 trillion in assets under custody and administration. Pershing has \$910.7 billion in assets held in custody and a staff of more than 3,800 experienced people who are highly focused on supporting Avisen Securities and our clients. Pershing is a proven, time-tested financial service provider, with unequaled experience that is a direct result of the depth and breadth of their collective relationships,

spanning more than six decades.

LOCKWOOD
ADVISORS
AN AFFILIATE OF PERSHING

Lockwood Advisors, Inc. (Lockwood), an affiliate of Pershing LLC,

Avisen partners with Lockwood Advisors, Inc. to offer our clients with a suite of investment solutions including separately managed accounts, mutual fund/exchange-traded fund (ETF) wrap accounts, discretionary unified managed accounts, and discretionary mutual fund/ETF wrap accounts. With nearly 300 years of combined experience, the Lockwood team is dedicated to helping financial institutions and registered investment advisors implement thoughtful, deliberate investment solutions. From their roots in money manager research, Lockwood has evolved to offer multiple fee-based investment solutions — all grounded in the same disciplined investment philosophy. Lockwood combines their expertise in capital markets analysis, portfolio construction and money manager research to build what they believe are comprehensive investment solutions.