



**About Us:**

Baldwin & Clarke is comprised of 5 independent companies designed to provide comprehensive and integrated financial services to high net worth individuals and business owners. We offer a holistic client relationship in order to distill, simplify, and manage complex financial planning requirements. Our business philosophy is centered on cultivating long-term relationships with our clients that appreciate and emphasizes the value of custom-crafted financial solutions.

*For over 40 years, we have worked to help our clients achieve peace of mind through customized and thoughtful planning.*

**Firm Highlights:**

- ✓ Founded in Boston in 1971.
- ✓ Professional staff accreditations include CPA, CFP, CLU, ChFC, MSFS, ASA, MSF and MBA designations.
- ✓ Senior management has over 150 years of collective financial services experience.
- ✓ Baldwin & Clarke Corporate Finance and 1<sup>st</sup> BCCW Capital Corp\* have completed in excess of \$1.2 billion in M&A transactions, including over \$500 million in capital raised.
- ✓ Baldwin & Clarke, LLP has placed close to \$1 billion of insurance for the purpose of addressing the business, estate, and personal financial needs of our clients.
- ✓ Baldwin & Clarke Retirement Plan Services is one of NH's oldest retirement plan consultancy firms with a strategic TPA alliance.
- ✓ Baldwin & Clarke Advisory Services\*\*, as a fee-only RIA, has prepared approximately 1,000 financial and legacy plans, saving clients hundreds of millions of potential estate taxes.

**Our Integrated Model**

**Independent | Flexible | Transparent | Holistic | Customized**

**1st BCCW Capital Corp.\***

**Baldwin & Clarke Corporate Finance, Inc.**

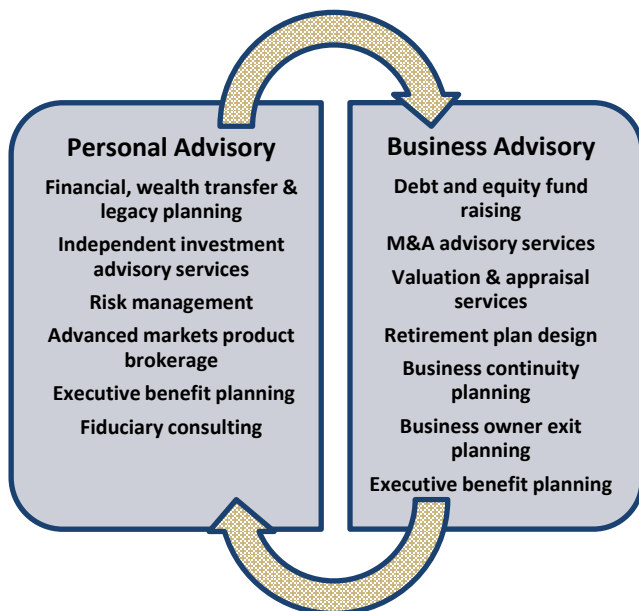
**Baldwin & Clarke Retirement Plan Services, Inc.**

**Baldwin & Clarke, LLP**

**Baldwin & Clarke Advisory Services, Inc.\*\***

**Breadth of Service:**

Our business model and client relationship management allows both individuals and companies the ability to access and leverage a diverse set of advisory services.



**Baldwin & Clarke Value Proposition:**

A high touch, high service client experience delivered through an architecture that can execute on both a best of breed and best of suite basis.

- ✓ Access to decision making personnel.
- ✓ Access to an institutional investment process.
- ✓ Independent and unbundled investment offerings – open architecture.
- ✓ Coordination with critical advisors.
- ✓ Management and design of employee and executive benefit planning.
- ✓ Coordinated planning through the integration of individual, family and corporate requirements.
- ✓ Access to sophisticated investment banking, business valuation and corporate financial advisory services.
- ✓ Ability to provide comprehensive family office solutions.
- ✓ Exposure to private equity, direct investing, and co-investing opportunities.

See reverse for disclosures



THE  
*Baldwin & Clarke*  
COMPANIES

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## *Company Fact Sheet*

### *Disclosures*

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\* In engagements where a registered broker/dealer is required, transactions are executed through 1st BCCW Capital Corp., 116 A South River Road, Bedford, NH 03110, (603)668-4353. They do not provide services through Baldwin & Clarke Advisory Services, Inc. 1st BCCW Capital Corp is a member of FINRA ([www.finra.org](http://www.finra.org)) and SIPC ([www.sipc.org](http://www.sipc.org)).

\*\* Baldwin and Clarke Advisory Services, Inc. is a Registered Investment Advisor with the United States Securities and Exchange Commission. Additional information about Baldwin and Clarke Advisory Services, Inc. is available on the SEC's website at: [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov), using CRD # 105666.

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