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**1919 Investment Counsel**



*The annual listing of 10 companies that are at the forefront of providing  
Wealth Management Consulting/Services and impacting the industry*

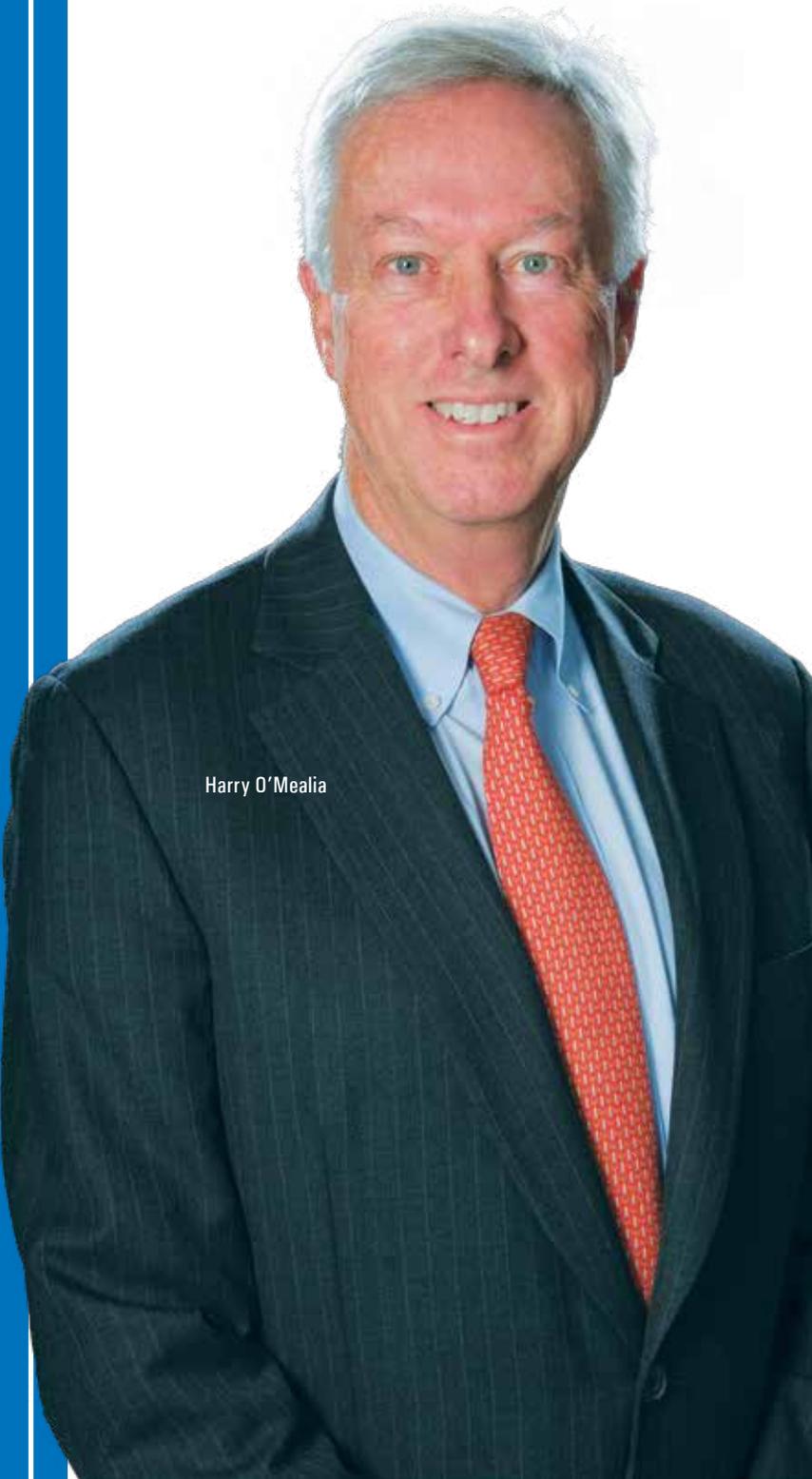
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# 1919 Investment Counsel

## Designers of Bespoke Investment Counsel Services



Harry O'Mealia

**T**he wealth management needs of institutions, high net-worth individuals (HNIs), and families are incredibly specific and diverse. However, in the race to profit, many traditional investment management firms now operate with disguised cookie-cutter solutions. They impose a standard, scalable model on clients who, in reality, have unique and particular needs. This can leave clients feeling unheard – and wondering if the solutions being offered to them are the best fit. In addition, as many firms streamline their services, it can be difficult for clients to compare fees and models. Every advisor seems to say the same thing. Clients often find themselves at the mercy of investment managers' model solutions, while to receive relevant and valuable advice, they should be collaborators. The process should be intimate and iterative. With all of the marketing hype out there, many individuals, families, and institutions are left asking: how do we find a wealth management firm that truly understands us and caters to our specific needs and goals?

The search ends with 1919 Investment Counsel (1919). Carving a niche in the world of wealth management with a highly experienced staff and over a century of expertise, 1919 has continuously brought transparency and personalization to investment management. The firm offers a range of customized solutions, including financial and estate planning, strategic asset allocation, portfolio management, family office services, responsible investing with environmental, social, and corporate governance (ESG) expertise and much more. "We have a long history of providing tailored solutions to our clients. We listen before offering solutions and then bring the full force of our team's capabilities to bear on what brought the client to us in the first place. Our goal is for each of our clients to perceive us as their Family Office. We seek to be our client's partner and their first call for advice or counsel on all things financial," says Harry O'Mealia, 1919 Investment Counsel's CEO.

1919 offers its clients unmatched levels of trust and understanding. Portfolio management and client advisory teams average over 25 years of client

experience, which enables them to deliver thoughtful access to personalized wealth management and investment strategies, rooted in tailor-made financial plans and holistic investment counsel (as embodied in its name). For 1919, it is essential that clients are part of decision-making. "We seek to understand before we prescribe and then maintain a close relationship with our clients – not just to monitor progress toward their goals but also to course-correct as needs or market situations change."

To that end, 1919 dedicates itself to deeply caring about each client, taking time to carefully analyze their unique goals, objectives, needs and values, and meticulously evaluating each element of their financial situation. "It's all about understanding the purpose of the money. Is it lifestyle, philanthropy, legacy, or something else?" says Harry O'Mealia. The upfront work is critical, as well as what happens afterward. Following the initial analysis, 1919 prescribes solutions that don't just meet clients' immediate needs but consider the long-term. The firm maintains a client log that traces the effect of



**“ We have a long history of providing tailored solutions to our clients. Our goal is to thoughtfully blend tradition with innovation so we will be advising clients a hundred years from now – many of whose families are clients today**

decisions on clients' portfolios over time. The log shows both decisions that worked as well as those that did not – which is part of 1919's commitment to transparency. Given the longevity of relationships that 1919 enjoys, many of which are multi-generational, the log becomes the proof statement of the firm's ability to add significant value over time – not just from investment excellence but also from holistic financial counsel and generational planning. To complement the log, teams also offer clients a graph that shows their entire investment cycle and current portfolio condition.

"Our commitment to managing relationships with a longer view than most differentiates us from many financial services firms," remarks O'Mealia. "This long-term vision comes in handy, particularly at times of uncertainty or inflection points in markets or in clients' lives." Much of 1919's value comes at moments when critical decisions about long-term financial health require rational, client-specific actions. 1919 safeguards clients against making short-term decisions during times of financial, professional, or personal stress and helps them navigate inflection points in their portfolios.

In a nutshell, 1919 adds value to clients by helping them build and then adhere to carefully built financial plans and investment strategies. With a strong emphasis on client service, 1919 has grown significantly over the past decade through a combination of organic growth, fuelled by self-sourced clients and client referrals. 1919 seeks to continually blend tradition with innovation, evolve and adapt with the times, and anticipate what's ahead – whether it's more powerful ESG research, creating a dedicated Women & Wealth team, or adopting new technology. "We're currently focused on building a firm of the future by acquiring the next generation of able thought leadership, employing a combination of tech and human skills. We seek to attract clients and employees who are curious, engaged, disciplined, and creative," concludes O'Mealia. **CM**