

INVESTMENT MANAGEMENT SERVICES

Leno offers the full range of investment management services that include options for clients who want to manage their own portfolio as well as those who want their investment portfolio to be managed by our in-house team of experts.

Whether you are looking to have a **Discretionary Investment Management Account** where Leno will manage your portfolio on your behalf according to an agreed upon investment mandate to reach your goals OR having a **Non-Discretionary Investment Management Account** where you make the investment decisions and Leno simply executes, Leno believes in being the resource you need and want to build your bridge to a brighter financial future.

Account maintenance fees for Non-Discretionary Investment Management Accounts can range from \$100 to \$250 yearly depending on the value of the portfolio.

Discretionary Investment Management Accounts have a management fee associated with them as well as being subject to the same account maintenance fees as Non-Discretionary Management Accounts.

Both accounts have additional fees related to the investment services related to the investment activity of the account including the buying and/or selling of the assets in your portfolio.

Contact us today for more information.



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