



"When Truth and Trust Matter"

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**Our service...**

Our mission is to assist you in finding solutions to protecting and growing your wealth as you plan for retirement, and then to realize desired income during retirement.

To do this, we specialize in a balancing system for managing life savings known as Balance Zone Investing, and Retirement Income and Distribution Planning.

We are committed to educating our clients about the potential risks and rewards associated with any investment strategy.



**Our approach...**

We are a boutique firm by design. This helps us to better understand our clients and provide responsive service.

We are independent of banks and brokerage firms, free to tailor investment recommendations to meet your needs.

As appropriate when building for retirement, clients are provided access to a wide range of available asset classes, strategies, and investment managers. During retirement, emphasis and services shift to effective income planning.

To provide the most responsive service, we are compensated by a [fixed quarterly retainer fee](#); hourly consultations are also available.

We are professionally accredited and draw on over 25 years of service.

We are conveniently located in Lawrenceville, NJ, but our service is not limited to this area.

For more information on the characteristics that distinguish our approach to helping you, please go [here](#). Aside from the other helpful information available on our site, please feel free to contact us for a friendly, helpful response to your needs.



Financial progress rests on the arches of careful planning and seasoned advice.

**Inverso Capital Management**  
 Registered Investment Advisor  
**Peter L. Inverso, CFP®**

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