MASON
INVESTMENT ADVISORY SERVICES, INC.

PRIVATE CLIENT SOLUTIONS

STEWARDS OF YOUR FINANCIAL SUCCESS

Personal Approach, Proven Process

For more than 40 years, Mason has integrated in-depth, multi-generational financial planning with sophisticated investment management services to deliver robust wealth management to a wide variety of individuals and families. With Mason, you benefit from a rigorous research-based approach, personalized service, and a team that is unequivocally focused on your mission and your goals.

$13.3B AUM
As of December 31, 2024

46 Credentialed Professionals*

40+ Years of Company History

Clients in 45 States**

The Mason Advantage

Headquartered in Reston, VA, we offer independent advice serving clients locally and throughout the entire U.S. As an independent fiduciary, we are committed to mitigating conflicts of interest and acting in your best interest. Our differentiation is based on:

- A long, stable history of ownership and an experienced management team
- Bringing particular expertise in serving retirees, corporate executives, women of wealth, entrepreneurs, and other distinct client segments
- Offering sophisticated approaches to financial planning, asset allocation, rebalancing, and manager selection
- Providing access to global private equity opportunities including buyouts, growth equity, infrastructure, and private debt
- A clear and transparent approach to fees
- Delivering consulting and Outsourced Chief Investment Officer (OCIO) services to community foundations and other institutions

*Credentialed professionals include Mason staff with advanced academic degrees and professional certifications such as CFAs, CPAs, CFPs and others.
**Mason has clients in 45 states and in D.C.

CONTACT US TODAY TO LEARN MORE.

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