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Dow	10318.16	-14.28	4:31pm
Nasdaq	2146.04	-10.78	5:30pm
S&P 500	1091.38	-3.52	5:01pm

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Martin L. Posner

Financial Advisor

4 Manhattanville Road
Purchase, NY 10577

tel: 914-701-7623
toll free: 800-423-0494
fax: 914-701-7676

>> Email Me

Welcome

Education

Experience

Services

Welcome



I seek to understand my clients broadly and deeply enough to find the opportunities that add value not only to their financial objectives, but also to their life aspirations. I determine what's really important and develop actionable, flexible strategies to help them meet their financial needs. I also design socially responsible investing portfolios for those who want to truly align their values with their investments, while also helping to deliver the financial returns that they desire.

Bulletin Board

- 529 Plans. Need help understanding how they can assist the educational future of your child or grandchild? For answers to your questions, please call or e-mail me.
- You've worked hard to build your wealth for retirement. We can work with you to develop a plan so your wealth works just as hard, to help you get the most out of life after retirement.

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