FORT PITT®
CAPITAL GROUP

What We Offer Organizations

Businesses | Institutions | Nonprofits

Asset Management

Retirement Plan Services

Banking Solutions

Executive Insurance Strategies

Tax and Legal Strategies

Pittsburgh Office
Foster Plaza Ten, Suite 350
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Grow Your Business & Work Smarter

Asset Management	Fort Pitt Capital Group offers a large firm's breadth & depth with in-house analysts, a powerful trading system, and certified financial planners but with a boutique's feel. Clients work with a small, dedicated client advisory team that takes a powerfully personal approach to identify, achieve, and monitor the institution's goals and objectives.
Retirement Plan Services	Fort Pitt's Retirement Plan Services team provides guidance and support in designing and managing employee retirement benefits packages. Our advisors work with businesses to understand their unique needs and goals and develop customized strategies to optimize their retirement offerings.
Certified Exit Planning	At Fort Pitt Capital Group, you can work directly with a Certified Exit Planning Advisor (CEPA). Our in-house Certified Exit Planning Advisor has been specially trained to create plans for business owners that will address their business, financial and personal challenges while providing them a clear path to achieve their goals.
Banking Partnerships	Through our bank partners, we can offer mortgage and lending solutions for your home or business needs.
Insurance Strategies	Insurance provides essential safety nets that protect you and your business from various risks and uncertainties. At Fort Pitt, we believe insurance should be an important part of a holistic plan for any business, institution, or nonprofit. That's why we offer our clients in-house risk mitigation solutions.
Shareholder Agreements	A shareholder agreement, or stockholder agreement, is a legally binding contract between the shareholders of a company. It outlines the rights, responsibilities, and obligations of each shareholder and establishes guidelines for decision-making, governance, and dispute resolution within the company. Fort Pitt can help you tailor solutions based on the specific needs and circumstances of the campy and its shareholders.
Business Valuation	Fort Pitt can work with your attorneys to help provide a clear understanding of a business's financial value, considering factors such as financial performance, assets and liabilities, market conditions, industry trends, and future growth potential.
Charitable Giving	Giving to qualified charities can often result in tax benefits for the giver. Fort Pitt can help businesses make the most of their donations by determining a strategy to lessen their tax burden while giving back to the community.

Step 1: The First Appointment

Our institutional investment process starts the same way as any of our engagements, no matter the size of your institution. We meet with your board of trustees, consultants, or investment committee to understand your unique objectives and goals

Step 2: Gather Documents

We'll reach out to the necessary parties to collect trust statements, plan documentation, adoption agreements, investment policy statements, and anything else we need to understand your needs further.

Step 3: Current Plan Analysis & Proposal

We dig deep, analyzing your current plan and try to find ways to improve your investment lineup. Based on our analysis, we'll create a comprehensive proposal that aligns your investment goals while staying in compliance with current regulations.

Step 4: Present the Plan

With our plan ready to get to work, we meet with your investment committee to discuss key findings and review our offering in more detail. We'll make any adjustments as needed and address any questions you might have. If everything is correct, we'll move forward.

Step 5: Ongoing Review

We maintain open communication throughout our relationship together. In addition to monitoring service providers and conducting quarterly review meetings, our team is uniquely able to help participants address financial concerns and provide guidance.

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