



The Baldwin Difference

At Baldwin, we look closer and go deeper to craft portfolios that can make a real difference in your life, in your future, and in the world around you.

Since 1974 Baldwin has been working to create, build and preserve wealth for our clients around the globe, and in all that time, we've come to understand that the experience of managing wealth is never the same for any two individuals or families. What matters to you and your family is always front and center, and a core tenant in how we approach your investments.

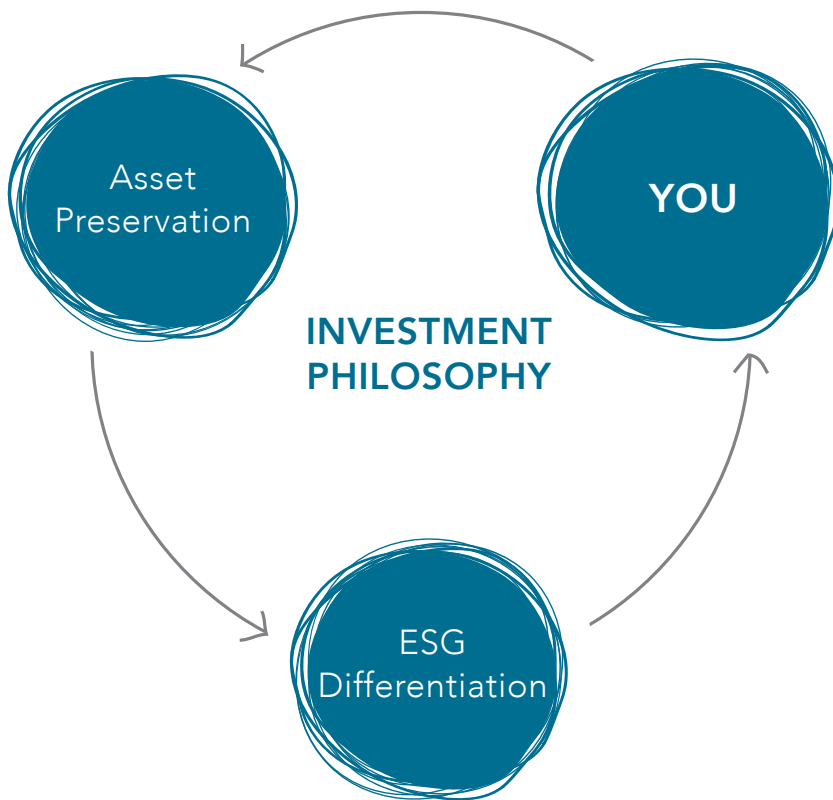
We craft personalized portfolios to reflect your long-term financial goals and investment values; we seek to preserve capital and enhance growth, applying a total wealth approach that includes equity, fixed income, and other public and private investments for diversification and risk management. Our fundamental analysis further defines us, integrating innovative Environmental, Social, and Governance (ESG) criteria into research to uncover companies and investments that are leaders and performers.

OUR INVESTMENT PHILOSOPHY

Our disciplined, diversified and strategic approach to portfolio management is rooted in a belief that long term thinking, transparent communication and values alignment are essential to helping you achieve your long term goals.



There's No Such Thing As One-Size-Fits-All Investment



What matters to you

What difference do you want to make?

ESG Differentiation

Which companies and investment strategies are most likely to perform well and demonstrate positive impact?

Asset Preservation

How can we build balanced portfolios, which capitalize on today's opportunities while managing risk and protecting your capital?

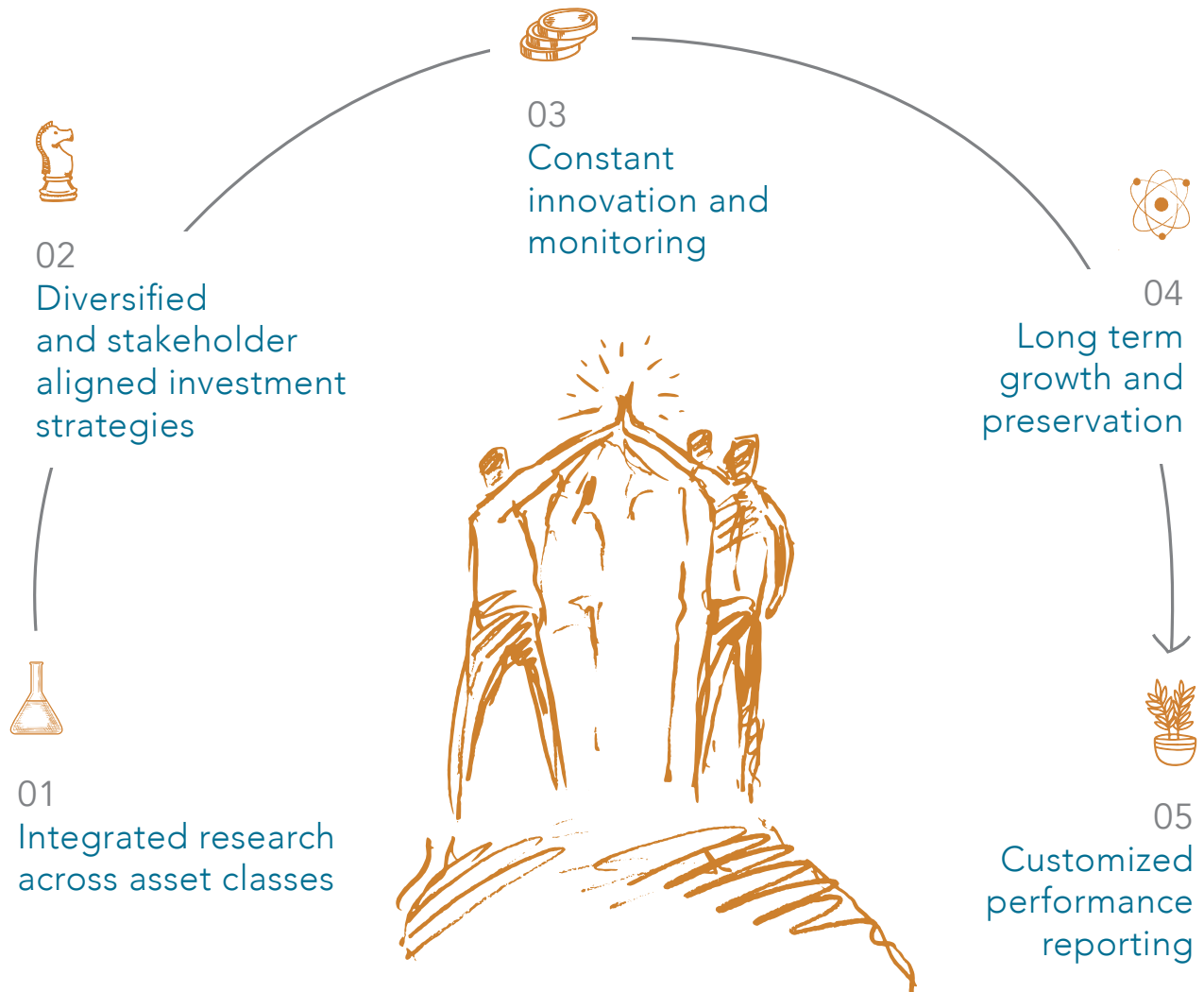
RESEARCH THAT LOOKS CLOSER

For over 4 decades, Baldwin has demonstrated an unwavering commitment to strong corporate governance, environmental awareness, and community wellbeing. By integrating Environment, Social and Governance (ESG) criteria into our research – rather than simply overlaying it on top of investment analysis – we uncover strategies and companies with informed practices that typically exhibit operational excellence, capitalize on growth opportunities, and align with stakeholder interests. Understanding ESG criteria also provides an additional layer of risk mitigation. We believe the integration of ESG criteria into research should result in less volatile investments that can individually and collectively support greater corporate transparency and longer investment horizons.

A COLLABORATIVE APPROACH

Who and what we invest in is just one aspect of our responsibility to you. We closely monitor your financial objectives, proactively communicate around market developments, and offer customized reporting to help you better understand how your assets are invested.

5 Keys to Success OUR INVESTMENT APPROACH





Baldwin - The Evolution of Investment

Genuine relationships and personal attention are the hallmark of the Baldwin experience. We've made lasting relationships that span generations because again and again we choose people over products, and family-impact over fast wins. You'll feel the difference the minute you meet us, and every single time for years to come.

Deliberately-sized and decidedly innovative, our high-touch, holistic, and collaborative approach puts you in a much better position to have a positive impact in ways that matter to you and your family. Unlike larger firms, trust departments and banks, we offer the flexibility to structure individual portfolios to address your unique priorities, risk tolerance, and tax situation, and provide a generous suite of services to help you live life to the fullest.

WE INVITE YOU TO START YOUR EXPERIENCE TODAY

Stop by and see us: 204 Spring Street, Marion, MA 02738 | **Email:** info@baldwin-llc.com

Additional information, including management fees and expenses, is provided on our Form ADV Part 2, available upon request or at the SEC's public disclosure website, www.adviserinfo.sec.gov. Past performance is not a guarantee of future results.