



Fountainhead Asset Management Partners with Valor Investments & Planning
CIO to provide expertise in the fields of planning and investing

WARREN, NJ, December 21, 2022 – Valor Investments & Planning (“Valor”) has combined forces with Fountainhead Asset Management (“FAM”). FAM’s strategic planning support and institutional level investment expertise will allow Valor to fully focus on its core specialization in financial and estate planning.

Valor’s sophisticated planning will be complemented by FAM’s investment process and established trading approach, able to manage all the complexities that come with customized solutions. Unique client financial plans and advanced portfolio capabilities like tax optimization and private investment opportunities will elevate Valor’s offerings to its client base. By leveraging FAM, Valor will have the ability to further deliver tailored investment expertise to its clients, while creating the bandwidth focus and scale necessary to grow its practice.

“FAM will allow us to hone in on our core expertise - financial and estate planning – while also playing a strategic role in our future growth as a firm. We are excited to provide our clients with a full team of experts focused on their success and feel confident this partnership will serve as a key differentiator for our firm” stated Jake Millen, President of Valor.

At the forefront of Valor’s business philosophy are its clients. Valor will be able to provide its client base with an enhanced experience through end-to-end expertise across the entire financial spectrum in guiding the client to retirement and beyond. Valor will lead in managing its clients’ objectives and needs, while FAM will lead in providing all investment-related services. These differentiated capabilities will result in each and every client reaping the benefits of the partnership.

“We are excited to partner with Valor in providing a sophisticated, all-encompassing planning & investment experience for its clients - the true winners of this integration. Valor’s clients will have a large team of experts providing end-to-end holistic financial planning and investment management for them and their families, while still maintaining strong, personal relationships with their advisor – an ideal scenario for both advisor and client” remarked Joe Halpern, Managing Partner of FAM.

FAM has partnered with RIAs, individual advisors, accountants, lawyers, and other strategic partners in providing a full-service, institutional level Chief Investment Office experience. This collaboration allows FAM’s partners to fully focus on what they are most passionate about – developing meaningful relationships with its clients while guiding them to financial success – and, at the same time, materially scaling and growing their financial practices.

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About Fountainhead Asset Management

Fountainhead Asset Management (FAM) is an Outsourced Chief Investment Office (OCIO) solution providing complete leadership in the field of investing. FAM provides its partners - advisors, accountants, and others - with the experience, leadership, and capacity required to provide a sophisticated and differentiated investment management offering. By utilizing FAM's OCIO services and capabilities, its partners are empowered to better serve advisor/client relationships while growing their businesses simultaneously.

To learn more about the power of partnering with Fountainhead Asset Management, please visit www.fountainheadam.com. Enhance Your Story With Us.

About Valor Investments & Planning

Valor Investments & Planning is a privately owned and independent Registered Investment Advisory providing a wide array of services that are curated to deliver a client experience that we're both proud of and excited to share. We're totally independent; free from any restrictions that would prevent us from seeking and delivering the right investment solutions or insurance products for our clients. We believe that money is a tool, not the goal, and our job is to understand the outcomes our clients want to construct a portfolio or plan that allows them to make informed decisions. Valor Investments & Planning is a member of The Advisor Network. The Advisor Network is a family of professional service organizations compiled to deliver high impact solutions in a consistent manner; to improve the ability of our advisors, and the experience of our clients.

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