

New Breed of Investment Advisors are Building New Traditions

Fusion Capital

A chance meeting at an investment conference brought two unlikely partners together to form a unique investment firm. Dan Webster, from Rochester, N.Y. near the border with Canada, and Jason M. Mengel, CFP®, who grew up in the Deep South in Atlanta Ga., had each relocated to South Carolina's coastal area to enjoy life on the water – Webster to Pawley's Island and Mengel to Isle of Palms. They owned separate practices in Charleston, Aiken and Myrtle Beach. After meeting, they realized they shared a vision that set them apart from the mainstream financial service industry, and they developed an idea to collaborate and “fuse” their advisor firms. They put a partnership into motion, named it Fusion Capital, and have not looked back since.

“Working together, we're able to serve clients even better,” says Mengel, a Certified Financial Planner™. “We are not trying to be the largest firm or to have the most assets under management. Instead, we strategically limit the number of new families we bring on each year so we can continue to provide an exceptional level of personal attention.”

Loyal, Independent, Creative

The two advisors are among a new breed of investment professionals who focus on developing relationships and individualized strategies rather than standard practices. “We're not



Jason M. Mengel and Dan Webster

mired down by ‘the way it’s always been done.’ And, as solely fee-based advisors, we act as fiduciaries and stewards of our clients’ assets,” says Webster, a 2011 Five-Star Wealth Manager.

This independence provides Mengel and Webster the luxury of being able to offer a true “best-in-breed open architecture platform.” They can search the entire investment universe, aligning themselves with top managers, economists and strategists, to structure customized portfolios based solely on each client’s investment objectives and risk characteristics. “We are not selling products or making commissions; instead, we are sitting on the same side of the table as our clients. They are the only ones we answer to,” adds Mengel.

Not surprisingly, this cutting edge team has attracted a very loyal clientele of affluent families in a wide range of ages.

They relate well to younger entrepreneurial families like their own as well as to those nearing or in retirement who are concerned about managing their wealth through their golden years in an ever changing market.

“Our commitment to unbiased advice and over-the-top service creates long-standing relationships built on trust. Our clients become a part of our extended family,” says Webster. “That’s a big departure from the way our industry has worked in the past and we’re happy to be a part of a new tradition.”

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