



Midyear Newsletter



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For more than 30 years, we have been providing uncompromising accounting, tax and consulting services to businesses and individuals throughout the South Shore area.

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Damon, Topham & Company named to 2011 Five Star Wealth Managers

Representing less than 3 percent of the wealth managers in the Boston area, the 2011 FIVE STAR Wealth Managers is an elite group that Damon, Topham & Company is proud to be named in the area of Taxation.



The 2011 Independent Survey of Overall Satisfaction (of wealth managers) was conducted by Crescendo Business Service and included over 149,000 households within the Boston area. On the surveys, recipients were asked to evaluate only wealth managers whom they know through personal experience and to evaluate them based upon nine criteria including customer service, integrity, knowledge/expertise, communication, value for fee charged, meeting of financial objectives, post-sale service, quality of recommendations and overall satisfaction.

Both positive and negative evaluations were included in the scoring, and only wealth managers with more than five years of experience in the financial services industry were considered. Additionally, each wealth manager was reviewed for regulatory actions, civil judicial actions and customer complaints as reported by the Financial Industry Regulatory Authority (FINRA), the Securities & Exchange Commission (SEC), the State Board of Accountancy and the State Bar.

Most people choose a wealth manager based on a referral from a friend, a chance meeting at a networking event or a blind search on the Internet. The 2011 FIVE STAR Wealth Managers - Independent Survey of Overall Satisfaction helps consumers make prudent choices to help them maintain and expand their net worth.

Let us know how we can help you.

Sincerely,

John T. Topham, CPA, CVA

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Damon, Topham & Company LLC