

Excerpt from Registered Investment Advisor Magazine Issue 26 – March 2020 (click here to view: [RIA Magazine Issue 26](#))

On the Road: Garden state gems



Photograph: iStock



Isaiah Green 16 March 2020, 05:00

Finding the community-based RIAs who make their home in New Jersey.

This time my travels have brought me to Union County, New Jersey to meet with three unique RIAs. In a state where the wealth management industry is traditionally dominated by the ‘big guys,’ these RIAs have found their niche in assisting diverse groups of people to preserve and build their wealth. Along with fun tidbits about the communities that they serve, we discussed their investment philosophies and projections for the next few years. While their approaches to serving clients may differ, it’s clear that all three embrace the communities of the towns that they’re in.

Glenn Blachman



**Gateway Advisory
Principal**

LOCATION: WESTFIELD, NJ

AUM: \$565M

CLIENTS: 550

EMPLOYEES: 9

What kind of clients does your firm serve?

Our firm is split between our private wealth clients and small- to mid-sized businesses that use our retirement and 401k services. On the private side, we provide holistic financial planning and investment management services to high net worth individuals and families. We also partner with non-competing professionals to address other areas of a client's financial well-being, such as insurance and tax needs.

What are your firm's goals for the next five years?

We believe we're on a good growth trajectory at the moment. We've made four acquisitions in the past five years and have a solid amount of organic growth from new clients and market appreciation. We expect this to continue over the next few years.

What's your favorite restaurant for business meals?

Addams Tavern, hands down. It's a cool place in town named after the Addams family. Fun fact: the creator of the Addams Family lived here in Westfield. The interior is well-decorated with a running fireplace during the cooler months. The design and level of service might have you think you're in New York or another large city. Westfield, in general, has so many great restaurants and extremely diverse cuisine. The town center attracts people from across the region, which is part of the reason we decided to set up shop here.

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