

Who We Are

Learn about our team and see what makes us different.



Our Services

Have a look at our specialized services and see if they suit what you're looking for.



Blog

Keep up-to-date with what's going on in the industry

Financial Planning For Your Future



Planning Ahead Doesn't Mean You Have To Put Off Living Today

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Focusing On Your Needs

You are unique - in your investable assets, in your life experience, in your financial goals. You want advice that takes into account when devising an appropriate plan for you. Capital Preservation Partners (CPP) takes time to discover where you are now and where you want to go. Unlike large Wall Street Firms, we start with you objectives, not canned asset allocation. We analyze your current positions, evaluate your situation and carefully decide on an implementation plan to help you reach your goals.



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Explaining Your Portfolio Strategy

As investor, you should always be familiar with your investments and what they are expected to accomplish. Whether we utilize top-performing, lower risk, no-load equity and bond mutual funds, fixed income products, ETFs, REITs or commodity funds, we keep you fully informed and you can be assured your best interest drive our recommendations. Serving your needs is our only mission!

Comprehensive Financial Advice

For Individuals, Families & Closely-Held Businesses

You want an advisor who can offer a plan designed to help protect and grow your assets in a variety of market conditions. Capital Preservation Partners offers comprehensive financial advice and can help you:

- Set Financial Goals
- Analyze & Manage Your Assets
- Develop Strategies To Minimize Tax Exposure
- Develop An Estate Plan
- Evaluate Your Insurance Needs
- Understand & Manage Your Cash Flow
- Plan For Retirement
- Fund Your Child's Higher Education
- Enjoy Your Wealth

Financial Facilitators

Managing Your Assets Through Strategic Alliances

Since Inception CPP has been able to with professional already established with clients and has the ability to refer based upon client needs to accounting and tax-planning experts, insurance specialists, business fiduciaries and attorneys. Our network of professionals have shown time and time again they are able to fully serve clients and provide reliable and expert advice.

Fee-Only Investment Advisors

As fee-only registered investment advisors, we offer unbiased financial advice to help you reach your goals. We charge a management fee based upon a percentage of the value of the assets we manage. The fee is an annual percentage fee, and is billed quarterly by taking the value of the managed assets at the beginning of each calendar quarter and applying one-fourth of that annual percentage fee. As fiduciaries, we do not collect commissions or accept incentives for the investments we recommend.

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Expert Professional Advice

Local Registered Investment Advisors Who Have Fiduciary Obligations To You, The Client

When you partner with CPP you join your neighbors. We are located in Westchester County, yet are ready to respond to you needs with our Wall Street experience. We are always available to answer your questions and concerns. Unlike giant banks and brokerage firms, you will speak to the same advisor who is thoroughly familiar with your portfolio and life circumstances.



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Michael Hymes, CPA

Managing Director, Portfolio Manager and co-founder of Capital Preservation Partners. A New York State licensed CPA since 1990, he owns Hymes & Company, CPA.

Kevin Mullins, JD, CPA, CFP

Managing Director and Co-Founder of Capital Preservation Partners. Attorney, Certified Public Accountant and Certified Financial Planner Practitioner that specializes in estate planning and business law.

Leo Gjoni, CFP®

After Graduating from Pace University, the Lubin School Of Business, he went on to earn the designation of Certified Financial Planner™. Leo is an experienced Vice President with a demonstrated history of working in the financial services industry. Throughout his career Leo has shown no matter where you are in life, he knows how to deliver the highest standard of financial planning service to make sure you're on the right track. From planning for retirement to saving for college, Leo is willing to work with you to develop a comprehensive strategy to reach your short- and long-term financial goals. Alongside his experience as a personal Financial Planner, Leo has collaborated with Third Party Administrators (TPA) to initiate pension plans for small business as well as larger non-profit 501(c) corporations. Leo has made it a point to make himself available to all his clients via meetings, phone, or email. "In today's corporate world having a financial planner that knows the sound of your voice speaks volumes" - Leo Gjoni

Rick Hodor, CPA

Managing Director and Co-Founder of Capital Preservation Partners. A Certified Accountant with his Masters Degree in Accounting from Long Island University.

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Building Your Plan

You'll find that we do not rush the planning process. At our initial meeting, we get acquainted, discuss your current financial situation and describe our process. At the next meeting, we discuss your assets in more in depth and offer suggestions we feel can help you reach your goals, as well as developing an Investment Policy Statement that describes the plan in detail. With your approval, we implement the plan and begin monitoring your investments, making adjustments as needed based on your life changes, as well as changes in the markets.



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Our Investment Philosophy

- We are committed to achieving our clients financial goal with a focus on solid investment strategies and overall risk reduction.
- Comprehensive wealth management services for individuals and institutions.
- Independent and objective money management, financial and tax planning services.
- A focus on risk reduction while building wealth, and/or generating income.
- Personalized asset allocation, investment portfolios & wealth management strategies.
- Fee-Only investment advisors.

The CPP Investment Process

- Thorough review of our clients financial situation in the context of their unique goals & needs.
- Comprehensive analysis of all current holdings and creation of an individualized asset allocation plan.
- Investments are continually analyzed and carefully selected to meet our clients objectives while reducing overall risk.

Manager Selection

- Identify managers with superior long-term risk adjusted performance during bull and bear markets
- Thorough statistical analysis and monitoring of investment discipline, style, tax efficiency and volatility.
- Investment guidelines include outperforming the benchmarks with less volatility.

Preserving And Growing Your Wealth

Determining your risk tolerance and investment time horizon are critical steps when developing a sound investment plan. You'll find we excel at both, as well as taking into consideration tax implications. Only then do we build an asset allocation model and suggest specific investments. Whether you want to increase your wealth at an aggressive rate or are more interested in having a steady stream of income, we do the research and make suggestions in line with your goals.

Asset Protection

Capital Preservation Partners uses Charles Schwab as our custodian for our client's assets as they covered by Federal Deposit Insurance Corporation (FDIC) and Securities Investor Protection Corporation (SIPC). Having Charles Schwab as our custodian allows for 100% transparency as all account balances and transactions can be verified through Schwab and clients have the availability to view their account through their online login.

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1 min & 13 secs

Learn why it's better to seek financial advice from a fiduciary.



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3 mins & 12 secs

Learn about the importance of tax & income planning and why you should develop a financial strategy to get the most out of your golden years.

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Life Insurance and Annuities for True Lifetime Protection

Submitted by Capital Preservation Partners on February 22nd, 2016

It is not often that the topics of life insurance and annuities are brought up in the same discussion, primarily because they serve two very distinct purposes. Although they are both products of life insurance companies, life insurance policies are protection against dying too soon, and annuities are protection against living to long.

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Submitted by Capital Preservation Partners on May 27th, 2014

This isn't our parents' or grandparents' retirement anymore. Just a few decades ago, many retirees enjoyed the full benefits of the "three-legged stool" of retirement provide by guaranteed pension payments, savings, and Social Security.

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Why You Need an Investment Coach

Submitted by Capital Preservation Partners on May 27th, 2014

If you believe some of the world's greatest investors, such as Benjamin Graham and Warren Buffet, it's not investments that cause people to lose money; rather, it's people who cause people to lose their money. What is meant by that is investing with sound principles and intelligent practices will always have a greater likelihood of success.

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Family Business vs Family Boundaries – Is the Health of Your Business at Risk?

Submitted by Capital Preservation Partners on May 27th, 2014

For over 200 years, family businesses have been at the core of wealth creation in America. Family business founders take the leap of faith to launch their business venture, often risking everything, and then spend their waking hours to realize their vision.

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The Very High Cost of Waiting to Save for Retirement

Submitted by Capital Preservation Partners on May 27th, 2014

This is the story of two friends – one, we'll call Randy, who, at age 25, recognized the importance of starting a retirement savings program. The other is Peter, same age, but he couldn't seem to see beyond his need for more immediate gratification – wanting to experience the kind of life style enjoyed by his more highly compensated friends.

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How to Achieve the Highest Quality of Life in Retirement

Submitted by Capital Preservation Partners on May 27th, 2014

Today's retirees are finding that retirement requires at least as much psychological and emotional preparation as it does financial preparation. So, retirement planning needs to include a thorough assessment of human assets and liabilities along with an assessment of financial assets and liabilities.

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Planning a Family – What to Save for Right Now

Submitted by Capital Preservation Partners on May 27th, 2014

The decision to go forward with your plans to start a family is a joyous one, but it can also lead to increased stress especially if your financial house has not been child-proofed. Considering that, on average, the cost of raising a child now exceeds \$300,000, there's little margin for error for most young families that have other important financial goals to achieve.

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Why You Should Monitor Your Credit

Submitted by Capital Preservation Partners on May 27th, 2014

Let's state up front that you don't need a credit monitoring service to stay on top of your credit status. For people who are diligent and deliberate in monitoring their own credit, they can do so by accessing a free credit report from each of the credit bureaus once per year.

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Smaller Investors Can Go to the Head of the Class with Institutional Shares

Submitted by Capital Preservation Partners on May 27th, 2014

Along with fund performance and risk ratios, expense ratios are a critical factor in determining the potential of funds to outperform the indexes and their peers, but they are easily overshadowed by robust returns in strong markets. Now that the market is settling in, and fund returns are reaching relative parity with the market, expense ratios become even more important.

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Planning for the New Normal Retirement

Submitted by Capital Preservation Partners on May 27th, 2014

The need for retirement planning didn't really exist until well into the 1970s. Up to that point, people worked until age 65, spent a few years in leisure through their life expectancy which was about 69. Many retirees of that era were able to coast into retirement with a cushy pension plan.

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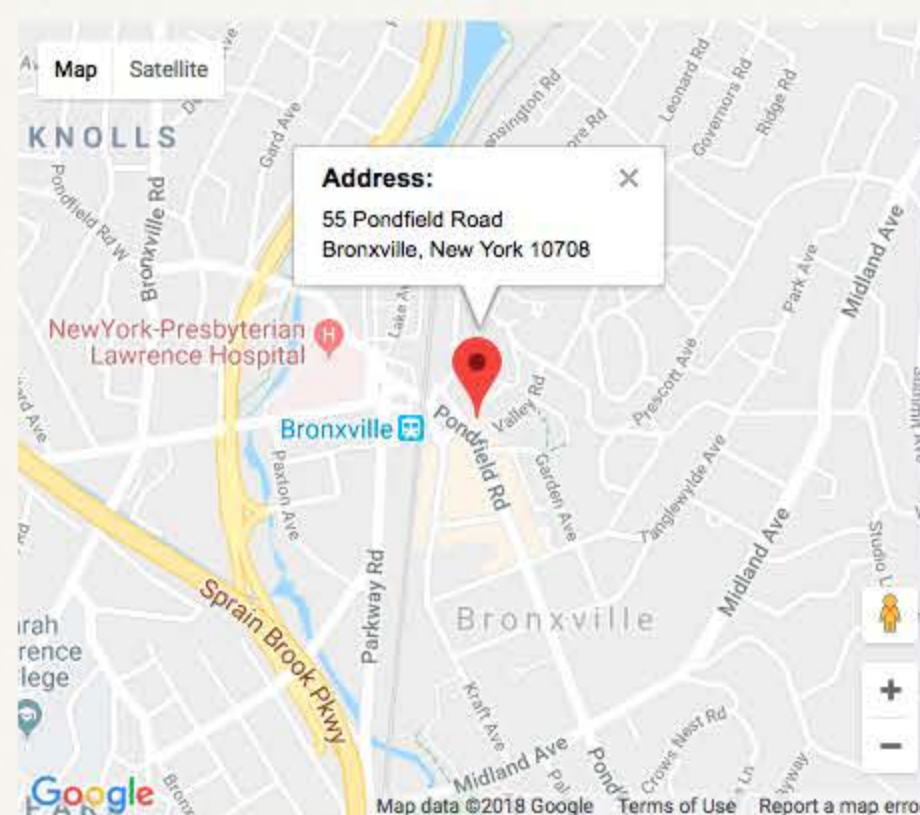


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Business Continuity Plan Summary Disclosure Statement

Capital Preservation Partners, Inc. (CPP) has developed a Business Continuity Plan (BCP) detailing how we will respond to events that significantly disrupt our business. Since the timing and impact of disasters and disruptions is unpredictable, CPP will be flexible in responding to actual events as they occur which may impact our business operations.

Contacting Us

If after a significant business disruption you cannot contact us as at (914) 337-2272, you should call our alternative number (914) 997-8529 or go to our web site at www.capitalpreservationpartners.com . If you cannot access us through either of those means, you should contact our clearing firm, Charles Schwab and Company, at www.schwab.com for instructions on how you can enter orders, access your funds and other account related information.

Our Business Continuity Plan

CPP plans to quickly recover and resume business operations after a significant business disruption and respond by safeguarding our employees and property, making a financial and operational assessment, protecting the firm's books and records, and allowing our customers to transact business. In short, our business continuity plan is designed to permit our firm to resume operations as quickly as possible, given the scope and severity of the significant business disruption.

Our business continuity plan addresses: data backup and recovery; all mission critical systems; financial and operational assessments; alternative communications with customers, employees, and regulators; alternate physical location of employees; critical supplier, contractor, bank and counter-party impact; regulatory reporting; and assuring our customers prompt access to their funds and securities if we are unable to continue our business.

CPP's clearing firm, Charles Schwab and Company backs up our important records in a geographically separate area. While every emergency situation poses unique problems based on external factors, such as time of day and the severity of the disruption, we have been advised by our clearing firm that its objective is to restore its own operations and be able to complete existing transactions and accept new transactions and payments as quickly as possible. Your orders and requests for funds and securities could be delayed during this period.

Varying Disruptions

Significant business disruptions can vary in their scope, such as only our firm, a single building housing our firm, the business district where our firm is located, the city where we are located, or the whole region. Within each of these areas, the severity of the disruption can also vary from minimal to severe. In a disruption to only our firm or a building housing our firm, we will transfer our operations to a local site when needed and expect to recover and resume business within one day. In a disruption affecting our business district, city, or region, we will transfer our operations to a site outside of the affected area, and recover and resume business within three days. In either situation, we plan to continue in business, transfer operations to our clearing firm if necessary, and notify you through our web site www.capitalpreservationpartners.com how to contact us.

If the significant business disruption is so severe that it prevents us from remaining in business, we will assure our customer's prompt access to their funds and securities.

For more information

If you have questions about our business continuity planning, you can contact us at (914) 337-2272 or (914) 997-8529.

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Expert Professional Advice

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When you partner with CPP you join your neighbors. We are located in Westchester County, yet are ready to respond to you needs with our Wall Street experience. We are always available to answer your questions and concerns. Unlike giant banks and brokerage firms, you will speak to the same advisor who is thoroughly familiar with your portfolio and life circumstances.



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Michael Hymes, CPA

Managing Director, Portfolio Manager and co-founder of Capital Preservation Partners. A New York State licensed CPA since 1990, he owns Hymes & Company, CPA.

Kevin Mullins, JD, CPA, CFP

Managing Director and Co-Founder of Capital Preservation Partners. Attorney, Certified Public Accountant and Certified Financial Planner Practitioner that specializes in estate planning and business law.

Leo Gjoni, CFP®

After Graduating from Pace University, the Lubin School Of Business, he went on to earn the designation of Certified Financial Planner™. Leo is an experienced Vice President with a demonstrated history of working in the financial services industry. Throughout his career Leo has shown no matter where you are in life, he knows how to deliver the highest standard of financial planning service to make sure you're on the right track. From planning for retirement to saving for college, Leo is willing to work with you to develop a comprehensive strategy to reach your short- and long-term financial goals. Alongside his experience as a personal Financial Planner, Leo has collaborated with Third Party Administrators (TPA) to initiate pension plans for small business as well as larger non-profit 501(c) corporations. Leo has made it a point to make himself available to all his clients via meetings, phone, or email. "In today's corporate world having a financial planner that knows the sound of your voice speaks volumes" - Leo Gjoni

Rick Hodor, CPA

Managing Director and Co-Founder of Capital Preservation Partners. A Certified Accountant with his Masters Degree in Accounting from Long Island University.

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You are unique - in your investable assets, in your life experience, in your financial goals. You want advice that takes into account when devising an appropriate plan for you. Capital Preservation Partners (CPP) takes time to discover where you are now and where you want to go. Unlike large Wall Street Firms, we start with you objectives, not canned asset allocation. We analyze your current positions, evaluate your situation and carefully decide on an implementation plan to help you reach your goals.



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Explaining your portfolio Strategy

As investor, you should always be familiar with your investments and what they are expected to accomplish. Whether we utilize top-performing, lower risk, no-load equity and bond mutual funds, fixed income products, ETFs, REITs or commodity funds, we keep you fully informed and you can be assured your best interest drive our recommendations. Serving your needs is our only mission!

Comprehensive Financial Advice

For Individuals, Families & Closely-Held Businesses

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- *Develop Strategies To Minimize Tax Exposure*
- *Develop An Estate Plan*
- *Evaluate Your Insurance Needs*
- *Understand & Manage Your Cash Flow*
- *Plan For Retirement*
- *Fund Your Child's Higher Education*
- *Enjoy Your Wealth*

Financial Facilitators

Managing Your Assets Through Strategic Alliances

Since Inception CPP has been able to with professional already established with clients and has the ability to refer based upon client needs to accounting and tax-planning experts, insurance specialists, business fiduciaries and attorneys. Our network of professionals have shown time and time again they are able to fully serve clients and provide reliable and expert advice.

Fee-Only Investment Advisors

As fee-only registered investment advisors, we offer unbiased financial advice to help you reach your goals. We charge a management fee based upon a percentage of the value of the assets we manage. The fee is an annual percentage fee, and is billed quarterly by taking the value of the managed assets at the beginning of each calendar quarter and applying one-fourth of that annual percentage fee. As fiduciaries, we do not collect commissions or accept incentives for the investments we recommend.

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