

GeoVest Advisors, Inc.



Photo by Kate Melton

GeoVest Advisors manages more than \$200 million for individuals, organizations, and businesses while catering to the specific parameters of its clients.

Conservative investing with a personal, caring touch

With a personal touch and keen attention to detail, Fairport-based GeoVest Advisors skillfully manages more than \$200 million for individuals, organizations, and businesses.

“Our company is a registered investment advisor,” says Robert Reeves, president and founder. “Unlike other managers who use model portfolios of mutual funds, we manage individual portfolios of marketable stocks, bonds, and money market instruments to meet the specific needs of our clients. Those clients include financial institutions, charitable organizations, pension accounts, trust accounts, and individual and retirement accounts.”

A committee of managers approves investments. The committee includes Robert Reeves, David Upson, Philip Bryne, Nancy Wagner, Michele Krug, and Sharon Allen. GeoVest Advisors earns money not by recommending certain investments, but through discretionary management of assets with a fee agreed to by the client.

Many potential clients approach Reeves for help after having a bad experience elsewhere.

“We offer them a very well-thought-out plan for them to achieve their financial goals,” he says. “Many have been burned elsewhere before we meet them. After they are with us for six months, they get really comfortable and understand what we are doing and know that we will do right by them.”

The firm’s personnel are experienced and con-

servative with client funds, and that quality is attractive to many people. “I think a lot of people come to us because they want a manager that has a low-risk style of investing,” Reeves says. “They don’t want to bet the ranch with their portfolios. They are often people who accumulated savings throughout their life, and they want a more conservative management style using highly marketable securities. We tailor our portfolios to the needs and risk tolerances of our client.”

Clients also receive high-quality customer service from GeoVest Advisors. Phones are answered promptly and messages are returned quickly. “Our clients aren’t just going to simply reach somebody here, they are going to reach somebody who really knows what he or she is talking about,” Reeves says. “Our people are well qualified and have a lot of experience in the financial services industry before they join us.”

Caring, helpful, and knowledgeable, GeoVest Advisors manages accounts for more than 200 individual clients. The firm is celebrating its 30th anniversary, but still has room to grow. “We certainly have the operational capability and data processing ability to handle two to three times what we are doing now,” Reeves says. “We look forward to helping many more people in the future.”

GeoVest Advisors Inc. is located in Fairport. Contact the company by calling 585-248-5050 or visiting geovestadvisors.com.

GeoVest Advisors, Inc.

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Website: www.geovestadvisors.com

Senior executives: Robert E. Reeves, president; David J. Upson, vice president

Employees: 6 professionals

Year founded: 1987

Products/services: Manages individual portfolios of marketable stocks, bonds, and money market instruments to the specific parameters of its clients.



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