FREQUENTLY ASKED QUESTIONS

Get to know Gryphon Wealth

Choosing a wealth management partner is worth taking your time on. These questions are here to help you understand who we are, how we work and whether Gryphon Wealth might be the right fit for your life.

What is Gryphon Wealth?
Gryphon Wealth is an independent, fee-only fiduciary firm based in Jacksonville, Florida. We combine investment management and comprehensive financial planning to help clients make thoughtful, coordinated decisions about their wealth.

What services does Gryphon Wealth provide?
We provide investment management and comprehensive financial planning, including retirement, tax-aware strategies, estate and legacy planning, and education and charitable planning. We bring these areas together into one coordinated plan rather than treating them as separate decisions.

How is your firm structured & how do you deliver advice?
We are a fiduciary, fee-only firm. We are paid by advisory and/or planning fee from client, not in the background by investment products or commissions. Our focus is on delivering clear advice, coordinated planning, and steady guidance instead of chasing the latest trend.

What can I expect from an initial meeting?
Our initial meeting is focused on listening: we learn about your goals, your current financial picture, and how you've made decisions up to this point. We also share how we work, our investment philosophy, and what an ongoing relationship looks like, so you can decide if our approach feels like the right fit.

How are you compensated?
We charge a straightforward fee based on the amount we manage for you, which aligns our interests with yours and keeps our focus on advice, not transactions.

How does your investment approach work?
We use research-driven strategies to build diversified portfolios aligned with your goals, risk tolerance, and time horizon. We aim for discipline and clarity, not constant trading or speculation.

How do you integrate financial planning with investing?
We start by organizing your accounts, assets, liabilities, and key goals into a clear, single view. Then we design an investment strategy that supports your cash flow needs, tax considerations, and long-term priorities, and we adjust as your life changes.

How do you help during major life transitions?
For events like retirement, selling a business, receiving an inheritance, or navigating a family change, we help you organize the details and understand your options. Our goal is to give you a clear path forward that respects both the financial and personal sides of each transition.

What is the minimum portfolio size to work with Gryphon Wealth?
Gryphon Wealth is best suited for clients with at least $1 million in investable assets. At this level, the financial complexity typically matches the depth of planning and investment management we provide.

How do I get started with Gryphon Wealth?
You can begin by requesting a discovery meeting through our website or by calling or texting our team at 904-450-5330.

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