

CENTRAL NEW YORK

BUSINESS JOURNAL

FAST TRACK 50 / REVENUE LESS THAN \$10M

Lipe & Dalton Investment Counsel, Inc.



17
contributed to the company's growth

- **CEO:** Willard C. Lipe III
- **Founded:** 2004
- **Employees:** 2
- **Company description:** Investment advisor/money manager.
- **What are the major factors that have contributed to the company's growth**

and success? The firm's success can be attributed to a disciplined investment process emphasizing research and a dedicated commitment to client service. All clients deal directly with the founders of the firm.

▪ **What is the best management decision the company made in the last year?** The best decision our firm made last year was to avoid the riskiest asset classes and securities in the financial markets.

▪ **What are the company's target markets and how does it market its message to these groups?** Our target markets are high-net-worth individuals, trusts, and institutional clients, such as pension and profit sharing plans, foundations, and endowments.

Lipe & Dalton delivers its message via word-of-mouth and an extensive referral base.

▪ **What are the company's plans for future growth and how will it accommodate this initiative?** Lipe & Dalton plans to sustain consistent growth by establishing ourselves as a source of knowledge and trust in the investment industry. Our means of achieving this goal is to build upon our core competency as a research-based firm.



Lipe