

YOUR #1 ADVISOR



FRACTIONAL FINANCE

Whether it's a temporary engagement or a CFO level resource part time – SAX Fractional Finance is here to support a business' needs. We can step in at any time and provide strategic thinking to maximize opportunities within a wide range of industries.

HR CONSULTING

We provide companies with a level of HR support to help make strategic long-term and day-to-day business decisions, and keep up with the changing regulatory and industry standards.

INVESTMENT BANKING

The SAX Capital Advisors team has a wealth of expertise needed to assist in finding the perfect partner when selling or acquiring a business, preparing your business for sale, raising capital, and/or restructuring your company, and more.

PRIVATE CLIENT

Our dedicated Private Client Services team offers tailored solutions, ensuring the utmost confidentiality while taking a comprehensive approach to wealth management. We assist in managing your wealth, preserving your legacy, and ensuring financial security for your family.

TRANSACTION ADVISORY & TRANSFORMATION

We are an M&A leader who works on our clients' behalf to ensure they are strategically positioned, identifying and realizing value during the due diligence process and throughout the entirety of the transaction.

TECHNOLOGY

SAX's technology arm has been helping organizations for years to become secure and properly managed from all angles. The mission is to enable clients to dynamically advance without having technology impede both growth and productivity.

VALUATION, FORENSIC & LITIGATION

Whether it is litigation, investigating potential fraud, Alternative Dispute Resolution or just trying to find a solution to a complex financial situation, we can help navigate through the intricacies of any matter.

WEALTH MANAGEMENT

SAX Wealth Advisors delivers wealth management solutions like financial planning, investment management, individual and employer retirement plans and more.