

DorchesterAdvisors – Client Profile



■ Male
■ Female
■ Family
■ Institutional



■ < 55 Years
■ 55 to 65 Years
■ 65 to 75 Years
■ > 75 Years



■ Single
■ Married
■ Divorced
■ Insit



■ NJ
■ NY
■ MI
■ Else

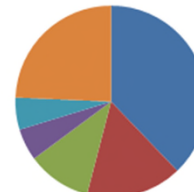
Average Age	58
Average AUM / Client	2.2 MM
AUM Range	163K to 16.8M



■ High Net Worth
■ Affluent
■ Institutional



■ Corp
■ Professional Firms
■ Entrepreneurs
■ Retired
■ Institutional



■ Medicine
■ Finance
■ Law
■ Arts
■ Life Sciences
■ Others



■ Masters
■ Bachelors
■ Instit

Data A/o YE 2025

