



**For Immediate Release:**

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## **News Release**

### **NUA Advisors Named 2010 Five Star Wealth Manager for Expertise, Overall Client Satisfaction**

*NUA Advisors is an Independent Registered Investment Advisory firm  
specializing in non-traditional investing in Self Directed Retirement  
Accounts as solution to market volatility*

**BOSTON (February 22, 2010)** – NUA Advisors, LLC, an investment advisory firm specializing in non-traditional investing within retirement accounts, has been named a 2010 Five Star Wealth Manager by an independent research firm for expertise and overall client satisfaction.

NUA Advisors ([www.nuaadvisors.com](http://www.nuaadvisors.com)) received the award following a rigorous evaluation process that included a survey of high-net-worth investors as well as financial industry professionals. Fewer than 4 percent of the wealth managers serving the Boston area were honored. Crescendo Business Services, an independent research firm, conducted the exhaustive study, and award recipients were featured in the February issue of *Boston Magazine*.

NUA Advisors sets itself apart among wealth managers by specializing in alternative, non-traditional investments in Self Directed IRAs for clients nationwide. Alternative investments can include real estate, secured and unsecured notes, tax liens, farm animals, domain names, business, airspace rights and cemeteries, to name a few. The full-service independent wealth management firm has offices in Lexington, Mass. and Portland, Maine and also advises clients on traditional investments such as stocks, bonds and mutual funds.

“This honor really confirms that our clients appreciate our innovative approach to jumpstart their portfolios by offering investment strategies that go far beyond the traditional market,” said Laurie Bachelder, Principal and Chief Compliance Officer of NUA. “Part of our goal has been to educate clients about achieving true portfolio diversification through non-traditional investing in their self-directed retirement accounts. This underutilized option can provide a hedge against market volatility.”

NUA Advisors was selected as a Five Star Wealth Manager from among 14,600 wealth managers serving the Boston area based upon nine criteria: customer service, integrity, knowledge/expertise, communications, value for fee charges, meeting of financial objectives, post-sale services, quality of recommendations and overall client satisfaction, according to Crescendo Business Services.

Researchers surveyed 105,000 high-net-worth residents in the Boston area and an additional 10,200 surveys were sent to financial services industry professionals, according to Crescendo Business Services. Finalists were then reviewed by a blue-ribbon panel of financial experts. The top scoring wealth managers received the Five Star Wealth Manager distinction.

“Since 1974, with the use of a self-directed retirement account, Americans have been able to invest their tax-deferred retirement savings in almost any asset of their choosing. Yet only a fraction of investors are aware of this important option,” Bachelder said. “Aside from a few investments, per the Internal Revenue Code (IRC), the list of possibilities is virtually endless. If the IRC rules and regulations are adhered to, the imagination becomes the only limitation”

“This type of portfolio management really is the future, as it allows our clients to invest in assets they know about in their retirement portfolio,” Bachelder added. “We are committed to educating all Americans of their right to invest retirement dollars in the assets they choose, not limited to traditional investment assets of stocks, bonds and mutual funds. We’re finding that a vast majority of people either don’t know or don’t understand this option.”

Although typically referred to as Self Directed IRAs (SDIRA), NUA Advisors, as part of its public education effort, prefers the term Self Directed Retirement Accounts (SDRA) since these types of accounts include 401Ks, SEP-IRAs, Simple IRAs as well as traditional IRAs.

### **About NUA Advisors**

NUA Advisors, LLC (NUA) is an independent investment advisory firm that is bridging the gap between traditional and non-traditional investing. NUA is unique in that its team of experienced and knowledgeable professionals specializes in alternative investments within a Self-Directed Retirement Account (SDRA). NUA advises clients on traditional securities investments such as stocks, bonds and mutual funds, as well as non-traditional investments. NUA serves clients in New England and throughout the nation from offices in Portland, Maine and Lexington, Mass. For more information contact NUA Advisors at [info@nuaadvisors.com](mailto:info@nuaadvisors.com) or visit NUA online at [www.nuaadvisors.com](http://www.nuaadvisors.com).

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