

Virtue Asset Management Prioritizes Direct Communication and Tax-Savvy Planning During Unsteady Markets

CHICAGO, IL, UNITED STATES, May 19, 2025 /EINPresswire.com/ -- With market volatility continuing to rattle investors in 2025, Virtue Asset Management is highlighting how its low client-to-portfolio manager ratio and hands-on tax strategies can help individuals and families stay confident about their financial direction.

“

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Robert Finley

Unlike many large institutions where clients often feel like just another number, Virtue Asset Management stands out among [independent wealth management firms](#) by connecting each client with an experienced advisor who manages a limited number of relationships. This model provides direct access to professional insights and makes it easy to set up timely meetings—something clients are seeking now more than ever, as headlines shift from week

to week.

“Our clients want clear, honest conversations when the markets are unpredictable,” said Robert Finley. “They want to know that someone who understands their entire financial picture is only a phone call away, especially when important decisions need to be made quickly.”

Another priority for many investors in recent months has been tax loss harvesting, a technique Virtue Asset Management integrates as part of its investment approach. By strategically selling investments that have decreased in value, clients may be able to offset capital gains and reduce taxable income for the year. The firm's advisors monitor portfolios for these opportunities, providing ongoing guidance so clients can make informed decisions without having to react to every market swing. More details are available in Virtue's recent article on [protecting wealth in volatile markets](#).

Clients of Virtue Asset Management benefit from transparent, fee-only advice. Every recommendation is made with the client's best interest in mind, removing the pressure that comes from commission-based selling. In addition to portfolio management, Virtue Asset Management's team helps clients with retirement projections, estate matters, and insurance reviews, giving clients a single resource for their entire financial life.

This approach, the firm says, is especially valuable now. "People want their questions answered quickly and their concerns addressed directly. That's hard to do with high-volume service models. Our size and structure make it possible to give every client the attention they deserve," added Robert Finley.

To learn more about working with an [investment management advisor](#) at Virtue Asset Management, or to schedule a conversation about tax strategies in today's market, visit their website.

About Virtue Asset Management

Virtue Asset Management is an independent, fee-only advisory firm headquartered in Chicago. The firm specializes in providing personalized financial guidance to high-net-worth individuals, families, and institutions, with a focus on open communication, direct access to decision-makers, and forward-thinking tax strategies. Virtue Asset Management's team draws on deep experience across all areas of financial planning, committed to helping clients protect and grow their wealth with integrity and transparency.

Robert Finley

Virtue Asset Management

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