

MDRN CAPITAL

FAQ



Who is MDRN Capital? Why have I not heard of you before?

MDRN Capital is a Registered Investment Advisor based out of Annapolis but operating in multiple states throughout the US. Our advisors have a collective 100+ years of industry knowledge between them and hold different industry designations. Our team has collectively worked for some of the largest RIA's and Broker Dealers in the United States and are proud to call MDRN Capital home.

How big is MDRN Capital?

MDRN Capital currently works with over 1,000 families nationwide. That's impressive when you realize the firm was only founded in 2023. We are currently one of the fastest growing RIA's in the US and feel grateful for the trust our clients have placed in us.

You don't have an office that I can walk into.

How do I know who is handling my money?

While MDRN Capital operates 100% Virtually, our custodians are large and reputable. At no time does MDRN Capital handle your funds, we are simply the advisor listed on your account at the custodial institution. For more information on our custodian, please check out <https://altruist.com/client-hub/>

What makes MDRN Capital different?

At MDRN Capital, we are truly independent. We believe in giving clients solutions to retirement problems and working alongside them to make sure those solutions fit their lifestyle needs. We are not a one size fits all approach. Also, by being fully virtual we are able to realize significant cost savings. This allows us to cover the cost of things like tax preparation and filings along with estate planning and trust work for many clients.

I'm not retiring for another 3-5 years. Shouldn't I wait until I retire?

Many of our clients began working with us prior to retirement. In most cases, working with us to plan for your retirement can be just as, if not more valuable than waiting until you are in retirement. Working with us 3-5 years before retirement can help us create a better retirement plan for you, ensuring a happier retirement experience.

I know you have talked about annuities in some of your marketing. I don't really want to annuitize my money. How do I keep control?

That's great to hear and frankly, we don't want to do that either. In the cases where we may recommend an annuity, it's simply a replacement for the traditional fixed income portion of a portfolio. Instead of stocks & bonds, we use stocks and other alternatives. Our goal is to utilize the annuity as another growth vehicle for our money. The benefit of this is twofold: 1) you keep control over your money and 2) they have protections in place against market declines.