



Our Core Beliefs

Where Research Meets Reality: Our Core Investment Beliefs

Our clients are busy, successful business owners, executives and professionals whose lives revolve around balancing the demands of their businesses, the needs of their families and their personal aspirations. At the base level their reality is simple; they are busy, in fact too busy to holistically manage their complicated life and the complicated reality of investing; that's where we come into play.

There is no one perfect way to create a portfolio or manage your financial future. Rather, our goal is to guide you through a process to define what is ideal for you, your family and your reality. By means of the discovery process we help you identify your needs and concerns and then help you put a plan in place that focuses on your goals and your future.

What sets us apart is our financial planning approach to investing? We listen first and then help clients prepare for life events – both expected and unexpected. This gives clients peace of mind to know their family is going to be taken care of no matter what. Through the planning process we determine how much risk is acceptable and the proper allocation to achieve your goals.

Asset allocation is important. Time and again, even the best stock-pickers have had their value-added swamped by an incorrect or ill-timed asset allocation call. Research supports the claim that historically, broad globally diversified portfolios have delivered higher risk-adjusted returns than those concentrated in fewer asset classes.

Diversification, asset allocation, and rebalancing are all part of a sound investment strategy built upon the time-tested economic concepts of Modern Portfolio Theory (MPT). We offer a unique approach to MPT by applying a combination of technical and fundamental analysis. Using a fundamental top down approach to determine what we own, paired with a technical analysis of when to buy, gives us the unique ability to strategically move in and out of the market, all while minimizing risk.

Knowing where you are today and where you are heading is step one. Our experience enables us to guide you through the complex world of investing and preparing for the unexpected. Many issues can affect your financial future and require planning and preparation. We intend to be there for you as your guide and help you stay on course toward achieving your ideal financial future.



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