

What type of investor are you?

Separately Managed Account Portfolios (SMA)	Pooled or Mutual Fund Portfolios	Exchange Traded Fund Portfolios (ETF's)
<p>Philosophy:</p> <ul style="list-style-type: none">• I want to see individual stocks, bonds and securities in my portfolio• I believe that the best results can be achieved through professional institutional money management firms. These firms have global resources, offices, analysts and portfolio management teams working to achieve the best results possible, using their professional networks with CEO's CFO's and Senior Management of firms. <p>Minimum investable assets: \$1,000,000</p>	<p>Philosophy:</p> <ul style="list-style-type: none">• I am not concerned about seeing individual stocks, bonds and securities in my portfolio• I believe the best results can be achieved through professional institutional money management firms. These firms have global resources, offices, analysts and portfolio management teams working to achieve the best results possible, using their professional networks with CEO's CFO's and Senior Management of firms. <p>Minimum investable assets: \$500,000</p>	<p>Philosophy:</p> <ul style="list-style-type: none">• I am NOT concerned about seeing individual stocks and bonds in my portfolio• I DO NOT believe the market can be beat through active management and I am willing to accept market returns less a cost. <p>Minimum investable assets: \$500,000</p>