
Our Investment Philosophy

We believe over the long term, underlying economic trends are the primary factor that impact financial markets. This shared, in the short and intermediate term, investor psychology and capital flow can materially impact security values, creating volatility, and thus, opportunity across global capital markets for investors. Thus, our investment process is both strategic and tactical in nature, and includes both fundamental and technical analysis while creating diversified, tax-conscious portfolios.

Our investment decisions are pragmatic and disciplined; this does not guarantee a profit nor protect against a loss, but it does reduce the probability of making emotional decisions, which can result in entering or leaving the market at precisely the wrong time.

Creating Informed Decisions

When it comes to investing, it is critical to know what you own, and understand what your aggregate investment fees are. We believe communication and transparency are enormously valuable in aiding our clients to make informed investment decisions.

Relative to holding cash, we believe this is an investment decision, and we recommend having enough on hand for future distributions required for the coming year. We suggest our clients consider anticipated expenses such as the purchases of an automobile, real estate, lifestyle expenses, or taxes; as in our eyes, it is better to hold these monies where they are safe and liquid, to avoid as much risk as possible. Depending upon your time horizon for these needs, we may opt to utilize high grade investment options such as money market funds, commercial paper, and treasury bills. Cash can also be used as the ultimate hedge in a distressed or illiquid market, and having cash on hand is tantamount for being able to make purchases coming out of market corrections, recessions, or other opportunities to acquire securities at attractive valuations.

Investment Research

To leverage our own fundamental and technical research of the capital markets, individual securities, and the economy, we rely upon a number of independent research organizations that complement our investment philosophy, including but not limited to BeSpoke, First Trust, and Day Hagan.

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