
Benefits of proactive fixed income portfolio monitoring capabilities

Like many fixed income investors, you may have a lot on your mind. Yield, of course, may be chief among your concerns.

But equally important is managing all the risks related to credit quality, interest rate movements, redemption possibilities, reinvestment opportunities and so on.

Who watches it all when you are not?

The threats that periods of market volatility and economic uncertainty may pose to your financial security may make managing risk a high priority for you.

With so many considerations to keep an eye on, however, monitoring your fixed income portfolio can feel like a full time job. And the more extensive your fixed income holdings, the more complicated and time consuming that job can be.

Peace of mind

The good news is: We offer a complimentary portfolio monitoring service featuring three key benefits that may help relieve some of the stress of managing a fixed income portfolio. Plus, it may help you feel more confident about your ability to fund the financial future you want.

Automated monitoring

Powerful computer processors and advanced search engine technology are used to scan the Internet for public information about each of your fixed income securities. With material information now primarily distributed by online sources, this sophisticated tool offers an efficient and effective way to methodically gather all the facts you need to make well-informed decisions.

Daily monitoring

A search of every fixed income security by CUSIP in your portfolio is conducted at the close of each trading day. If a material fact is detected, your financial advisor is promptly notified. That way, he or she can contact you if there is anything to report. So you do not have to worry about receiving spam e-mails or junk mail. Simply wait to hear from your trusted financial advisor. Otherwise, no news is good news.

Proactive monitoring

Having advance notice of material events regarding your fixed income securities may help us better identify opportunities and threats — and take appropriate action — in a timely manner.

What is monitored

- Credit rating changes
- Defaults
- Redemptions (including calls and refunding)
- Price changes
- Muni material events

Start today

Our automated, daily, proactive fixed income portfolio monitoring capabilities are like having the thorough “check up” your portfolio gets as part of your annual review. Only we monitor for opportunities and threats 365 days a year.

To find out how easy it is to transfer assets — and start benefiting from this important and complimentary service — speak with your financial advisor today.

Our firm does not provide tax or legal advice. All decisions regarding the tax or legal implications of your investments should be made in connection with your independent tax or legal advisor.

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