

The Vermont Wealth Portfolio Design Optimizer



A sset allocation. You've probably seen the simple models and charts...where to put your money based on your time until retirement. This approach makes sense if everyone's situation and goals are similar. But they're not.

The right investment mix, combining vehicles for asset preservation, growth, risk and safety, can help a portfolio generate the required income no matter how the economic wind is blowing.

A Portfolio Engineered for Success

At Vermont Wealth & Retirement, we start with the end in mind. By understanding your priorities and income requirements, we 'reverse engineer' an investment strategy designed to best achieve your objectives.

Together, we determine the income level required based on your current situation and vision for retirement. You may be acquiring assets to secure your financial future, or anticipating a portfolio producing income to sustain a certain lifestyle and financial position.

Working together, we examine available assets and revenue sources. Through this process, a clear view of projected

income and expenses comes into focus. If a shortfall is discovered, we work with you to find ways to close the gap.

What's in the Bucket Counts

Each client requires a different level of growth, income and cash reserve in their portfolio. By starting with the end in mind, Vermont Wealth & Retirement advisors help design your portfolio, and fill each asset bucket with just the right mix.

Vermont Wealth & Retirement offers thinking that goes beyond stocks, bonds and cash, introducing investment options that are designed to help you weather uncertain economic times. Our advisors leverage traditional and alternative investments like real estate investment trusts and managed futures portfolios to diversify your portfolio so that you can confidently face the future.

The investment decisions you make today can have profound influence on your life, impacting your business, lifestyle, retirement and legacy. Vermont Wealth & Retirement is ready with the commitment, knowledge and tools to help you reach your financial objectives and sail through economic squalls.



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VISION FOR YOUR CHANGING WORLD

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