INVESTMENT GUIDE | OUR PHILOSOPHY, YOUR FUTURE

Our investment philosophy relies on a disciplined and repeatable process for a more consistent approach. This sophisticated approach to portfolio construction is backed by a thorough knowledge of managed investments and complementary investment strategies.

Contact us to learn more at 404-441-9387.

DIVERSIFICATION

Rather than settle for a simple stock-bond-cash approach to asset allocation, your portfolio will be diversified using a wide range of financial and investment techniques, based on your time horizon, risk tolerance and investment objectives. The customized portfolios represent the expansive universe of our evolving investment marketplace. Designing a portfolio with this breadth and depth of investment types can benefit you by providing exposure to asset categories that have historically been less correlated with each other. By using a blend of complementary products, our goal is to help you create a customized total portfolio to bring your goals more within reach.

INVESTMENT SELECTION

We understand that high-quality managers are a critical component to a portfolio's success. Leveraging our network of resources, the Balance Wealth team will evaluate managers' strategies and performance via a rigorous manager evaluation process. Our team selects those investment options which meet our rigorous standards for style, performance, manager tenure, and expense. Comparing those leading managers against other managers within their peer groups further defines the options. Finally, we conduct a thorough evaluation by examining risk characteristics and assessing the execution of the investment strategy over time.

EFFICIENT PORTFOLIO CONSTRUCTION

Once our team has a set of recommended investment options, the next step is to assess how they will work together in a multi-manager portfolio. The goal is to establish a specific role for each investment that decreases overlap and delivers appropriate diversification. The overall portfolio will require the artful integration of each selected manager to implement the allocation target and align with your short- and long-term goals.

ONGOING TRACKING

By developing a long-term relationship with you, we can regularly track your tailored portfolio to help ensure that the investments stay aligned with your objectives and goals. Due to the complex nature of some investments, we find it necessary to conduct in-depth reviews of our clients' investable assets on a regular basis. On average, it is recommended that we meet twice a year to review your investments.