

So why'd you do it Miller?

It has been 6 short months since the opening of Momentum Wealth Strategies. In that time I have had the chance to tell the Momentum story over and over again to both friends and clients. I am very grateful for the overwhelming support I have received. So why did I do it? Why did I leave my previous firm and open my own office? Why did I team up with LPL Financial?

The answer to these questions can be answered with another question.

- *With only 260 working days in a year, how can any advisor do an exceptional job for each and every client if their business holds thousands of individual positions spread out over hundreds of different households?*

The Momentum story is about knowing each and every client's needs. Knowing what they are working towards and when they want to get there. Every client has an individual story and it's a damn important one! This can only happen by maintaining a client base that is of manageable size. My commitment to clients is to never have more than 100 households. In doing so I will be able to offer outstanding service to all of my clients.

By joining LPL Financial I was able to create my own business plan and design an office space that caters to an excellent client experience.



From cutting edge technology in the "Power Room" to the beverage menu and reclining meeting chairs set in a cozy "living room" atmosphere, every part of the office is designed to make the client experience extra special. Because it should be - that's why!



What's in a name?

While "momentum" is a style of investing and I use it as part of my process, there is a much deeper meaning to the name. Throughout life we should strive to maintain our momentum. Every stage - from school, through our careers and especially during our "golden" years, we should not sit idle. We should strive to grow. Push ourselves to

learn more and enjoy more.

So now what?

For years I have been writing articles about tuning out the noise of the news media. In 2009 I began building models using specific tools to help avoid making investment decisions based on headline noise and pundits yelling “advice” into the television camera. By using a rules based system, I manage diversified portfolios while working to quiet some of the market volatility.*

- Earlier this spring I reduced exposure to the international markets and increased exposure to cash.* This has helped ease some of the downside during the recent pullback
- As of this writing, the Dow Jones Industrial Average has lost 3.5% in the past 365 days. Reminding us that investing takes patience and sometimes markets are just flat.**
- Parts of the fixed income market (bonds) has been strengthening recently but with rate hikes looming in the near future I am watching for new signals in this area.
- Commodity prices continue to be weak. Worries about China’s weakening economy will likely cause this trend to continue.

* Recommendations are subject to change at any time based on market and other conditions

There is no guarantee that a diversified portfolio will enhance overall returns or outperform a non-diversified portfolio. Diversification does not protect against market risk. The Dow Jones Industrial Average is comprised of 30 stocks that are major factors in their market industries and widely held by individuals and institutional investors. Indexes performance is not indicative of the performance of any investment. Past performance is no guarantee of future results. Bonds are subject to market and interest rate risk if sold prior to maturity. Bond values will decline as interest rates rise and bonds are subject to availability and change in price.

Contact Us

Give us a call for more information about our services.

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Check out the new website!

The Momentum website is full of useful content and links to view your account details. Check it out and give me some feedback.

www.MomentumWealthStrategies.com

Family Matters

Yesterday was a big day. Carrie and I took Lily to check out her 1st grade class at Fernan Elementary. Let’s just say the playground was most impressive. We

have managed to spend some time on Lake Coeur d’Alene aboard the Tiny Dancer. While it is sad the boating season is drawing to a close we look forward to cooler weather and rain to help with the fires throughout the Northwest.

