BRINGING FIDUCIARY STANDARDS TO ALTERNATIVE INVESTMENTS

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Two questions investors should ask of a prospective advisory firm: What conflicts of interest exist? Will you be sitting on my side of the table?

If you receive explanations instead of one-word answers, chances are the firm is working in its own best interest—not yours.

◆ HIGH-TOUCH MEETS HIGH-TECH

As a Registered Investment Advisory (RIA) firm, Capital Wealth Management Inc. maintains an unfaltering commitment to fiduciary standards in its work with individuals, families and qualified plans.

Along with five of his team members, President and CEO Lee Duckworth is an Accredited Investment Fiduciary (AIF)—one of the industry's most respected designations. Deep knowledge of best practices and a focus on innovation support the firm's client-centric culture.

"A substantial number of our clients are at or approaching retirement," comments Duckworth. "They want excellent transparency, control over their investments, ample flexibility and an advisor relationship. We deliver on all fronts."

Capital Wealth Management partners with eMoney Advsior to offer web-based wealth management. A private login to the fully encrypted platform allows clients 24/7 access to account information, updated daily. They have the ability to link all of their accounts into the system—even those managed by other firms.

"If you can't measure it, you can't manage it," recites Duckworth. "We believe our system offers the best measurement technology that exists today. The horsepower is tremendous."

◆ ALTERNATIVE INVESTMENT EXPERTISE

Amid the challenges of the current fixed income environment, Capital Wealth Management is gaining commendation in financial circles throughout New England for its alternative investment expertise.

"In a near-zero-interest-rate environment, you have to be creative to get results," says Duckworth. "We devote considerable time and resources to researching and working with alternative investments. This enables us to build well-diversified portfolios with predictable components."

Energy sector investments, non-traded REITs, senior secured floating rate debt and equipment financing are among the firm's alternative vehicles that typically generate a 6 to 8 percent yield.

Because the firm's clients have diverse needs and preferences, the firm is "style-agnostic," using both actively and passively managed mutual funds and ETFs in the 23 traditional asset classes it manages.

As Capital Wealth Management enters its 26th year, Duckworth jokes about the leadership dynamic behind its success: "We have a durable and repeatable process in place for making investment decisions, but don't ask us to pick out carpet or change the color of the walls."

Capital Wealth Management Inc. is located at 1300 Division Road, Suite 203, in West Warwick, RI. For more information, call 401-885-1060 or visit capitalwealthinc.com.

CAPITAL WEALTH MANAGEMENT

Your Trust is our Guide

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