



Discretionary Management

I am a fee based, discretionary Portfolio Manager and work with Anna Nemeth, Vice President and Senior Portfolio Manager to offer a team-based approach to wealth management.

As a Portfolio Manager, I have a duty to act in your best interest and an obligation to put my client's interest far before my own in all recommendations that I make.

As a Chartered Financial Analyst (CFA) Charterholder and CFA Institute member, I abide by the Code of Ethics and Standard of Professional Conduct ([Code and Standards](#)) and attest each year that I am in compliance with their requirements and in good professional standing.

Benefits of Discretionary Investing

You no longer have to make daily investment decisions – you can entrust them to our team. We can manage your money for you, not just with you.

One transparent, asset-based fee with no commission per trade lets us focus on driving your portfolio's success without worrying about the cost of trades.

Sudden opportunities and risks can be addressed swiftly without waiting for your approval.

Our clients receive a custom Wealth Plan outlining their unique investment objectives and risk tolerance. They also receive an Investment Policy Statement which outlines their specific investment strategy and is updated annually or any time their financial situation changes.

An Investment Policy Statement is an important legal document whereby we manually agree on certain parameters such as acceptable volatility levels and assets allocation ranges (i.e. cash, fixed income, equities and alternative investments) that are customized to each individual client.