

1 Fear Of Loss

Are we more sensitive to loss than to risk and possibly return?

The idea of “loss aversion” isn’t new. In fact, we’re probably all conditioned to feel this way (we just haven’t realized it). For example, choose between receiving \$900 or taking a 90% chance on winning \$1,000 (and a 10% chance of winning nothing)—taking the guaranteed \$900, for most, is a “no-brainer.” Now, choose between losing \$900 or taking a 10% chance at losing nothing with the prevailing penalty being a \$1,000 loss—you’d roll the dice, wouldn’t you? It’s ironic that investing in a “sure loss” seems a lot more reasonable than the risk of incremental gain, yet both options have equal expected values.

2 Gaining A Foothold

“What’s your one best idea?”

This is something we get asked all the time. In the past, inexperience would have compelled me to force an answer but, as I’ve matured, I’ve come to realize that there isn’t one “best” idea. Instead, it’s a series of decisions or a very intentional composition that brings ideas to life. Think of it as the concept of synergy. Or, even better—would you ask a chef for their one best ingredient? Just like a chef, for us it’s about building a profile using a number of different ingredients for a composed offering. Well, unless it’s sushi...

3 A Barbell Approach

I wouldn’t coin myself as a gym rat of any kind— But, (of late) I feel like I’ve been putting in extra reps as we realize investor gains. Just as we had done when there were fears of trade tension, tightening rates and a Euro slowdown, we’ve maintained an evenly-weighted approach of growth and defensive holdings. Call it conservative—but, it’s important to maintain a strong core if you wish to maintain form, avoid injury and make gains in the long-term.

A RECIPE FOR RETURNS



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PORTFOLIO MANAGER

WE MAKE INVESTING PERSONAL

We believe that you should be free to follow your passion in business or life, to spend precious time with the people who matter the most to you. You should be able to do this, knowing your financial future is secure and your family is looked after.

READY TO CHAT?

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OUR UNIQUE INVESTMENT STRATEGY

We offer a high-performance approach to investing. Using our unique qualifications as a Portfolio Manager, we build and manage a strategic fund that is constantly monitored, evaluated and adjusted to deliver optimal performance. With 100% transparency, we put our money where our mouth is by personally investing in our own model.

FINANCIAL PLANNING WITH HEART

We start by getting to know you. Our in-person meeting is where we truly uncover what matters the most to you. We craft a strategic financial plan that shows you, step-by-step, how we can take you from the island of uncertainty to the island of peace of mind.

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