

July 2017

"Why RIA, CFP, CFA? Because you deserve no less."

Who's Really Advising You? (from page-1)

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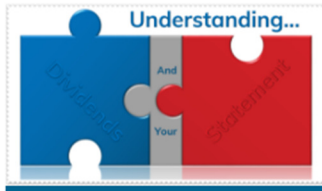

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 <p>Manager's Letter 2017 Q2</p> <p>Sector rotation has accelerated to a whipsawing pace. Mismanaging sector allocations can severely affect your portfolio's risk-adjusted performance. Is it time for sector rotation strategies? If you like jumping from one moving roller coaster onto another, then yes.</p> <p>read more</p>	 <p>Who's Really Advising You?</p> <p>Recent Department of Labor (DOL) Fiduciary Rule changes may have you wondering, "Who's really advising me?" Asking the right questions can help guide you to the appropriate path for your unique financial and lifestyle goals.</p> <p>read more</p>	 <p>Dividends & Your Statement</p> <p>June brings some extra dividends from funds which pay semi-annually. It's also when investors have more difficulty understanding their account statements. A basic knowledge of dividends and how they're reported can replace frustration with understanding.</p> <p>read more</p>	 <p>Earnings Insight May 2017</p> <p>Companies are finally turning performance from "worst-since" to "best-since" while wrestling rising hurdles in a radically changing environment. Expectations have risen to over 20% growth, much of which markets have priced-in at peril of a more serious correction.</p> <p>read more</p>
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