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REGISTERED INVESTMENT ADVISOR



Managing Risk -The Big “ah-ha”

TRADITIONAL: MINIMIZE PURE/SPECULATIVE LOSS

- ★ Identify and analyze loss exposure
- ★ Examine alternative risk-management techniques
- ★ Select risk-management techniques
- ★ Implement techniques
- ★ Monitor results

INVESTMENT: MINIMIZE PORTFOLIO RISK

- ★ Identify current portfolio asset-class risk exposure
- ★ Examine other asset classes that might strengthen the portfolio’s fiber
- ★ Select optimization and benchmark techniques
- ★ Implement the revised asset-class portfolio
- ★ Monitor results

