

ASPIRATIONS IN BALANCE

We believe a successful investment experience is based on achieving the right balance of risk and reward. Statera seeks to provide that balance.

[CONTACT US](#)

ASSET MANAGEMENT

We manage a suite of model portfolios for advisors to select for their clients, based on individual tolerances for risk and timelines for meeting investment goals.

Each invested across multiple asset classes, the long-term-oriented models are designed to serve as whole- or core-portfolio solutions

[Learn More](#)

INVESTMENT INSIGHTS

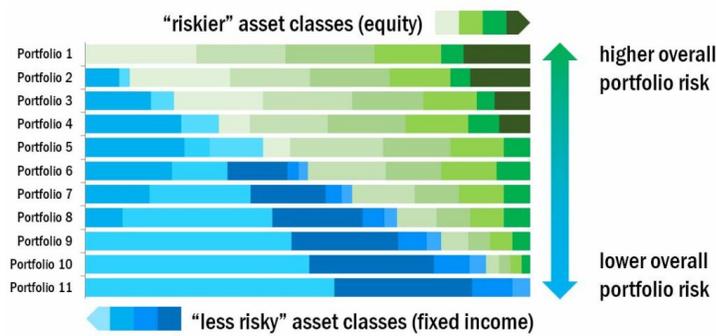
We believe education to be core to the ultimate success of the client in achieving long-term financial goals. Our monthly commentaries focus on establishing and maintaining knowledge of and confidence in our investment philosophy and approach. In turn, our quarterly market reviews provide regular updates regarding broader market performance and factor influences on the absolute and benchmark-relative returns of our model portfolios

[Learn More](#)

TARGETING RETURN. TOLERATING RISK

We believe clients who understand their investment plan and tolerance for risk and who take a balanced approach to managing that risk can enjoy better outcomes in investing. Statera's differentiated approach enables advisors to adjust their clients' investment plans as

life circumstances and emotional tolerance for risk change over time.



NEXT STEPS...

We seek to help advisors achieve balance in their clients' financial lives. Reach out to learn how Statera portfolios may support progress toward investment goals.

Contact Us

LATEST INSIGHTS...

SHOW ENTRIES

[Reset](#)

SEARCH:

Categories

Date

Document

Summary

Commentary June 8, 2019 Challenging Our Biases Humans can be faulted for behaviors of all sorts, and our penchants when investing are ...

Commentary May 2, 2019 Don't Forget to Save Our industry spends a great deal of time thinking about where a portfolio is invested ...

Market Review April 16, 2019 Q1 2019: Quarter in Review The first quarter of 2019 provided yet another example of why we think it generally ...

Commentary April 9, 2019 Owning Apple...and So Much Else We continue to believe that, based on our experience and that of the broader industry, ...

Commentary March 4, 2019 [What to Talk About Today?](#) Never ceases to amaze us the ways financial market media will torture market data in ...

Showing 1 to 5 of 46 entries

Previous [1](#) [2](#) [3](#) [4](#) [5](#) ... [10](#)
Next

CONTACT US

Email
info@statera-am.com

Phone
949.261.7726

Address
19900 MacArthur Boulevard
Suite 920
Irvine, CA 92612

FAQ

[Important Information](#)

[Privacy Policy](#)

SIGN UP FOR STATERA COMMENTARIES AND UPDATES

CHOOSE TO SUBSCRIBE OR UNSUBSCRIBE FROM STATERA COMMENTARIES:

- SUBSCRIBE**
- UNSUBSCRIBE**

FIRST NAME

LAST NAME

EMAIL ADDRESS:

SIGN UP