

Expect more from your financial advisor.

# KNOW WHAT YOU OWN

and why you own it

Life can be challenging. Investing doesn't have to be.



#### A CLEAR PATH FORWARD

Our tailored financial plan will enable you to act boldly. Our investing approach, focused on quality, seeks to inspire confidence no matter what lies ahead.

[LEARN MORE \(/SERVICES\)](#)



#### PUTTING YOU FIRST

We invest for clients in the same way we invest for ourselves and our family members. We act as a fiduciary, always placing your interests ahead of our own.

[LEARN MORE \(/FIDUCIARY\)](#)



#### REFRESHINGLY SIMPLE

Our time-tested approach of purchasing only what we believe to be high quality businesses at attractive prices, is simple and effective.

[LEARN MORE \(/PROCESS\)](#)



## We invest differently so you can live differently.

Our high conviction investment approach seeks to help you retire earlier by improving performance. By owning businesses over long periods of time, we aim to improve after-tax earnings. These Selective businesses demonstrate consistent, predictable and growing earnings power, creating wealth for our clients over time.

[DISCOVER WHY IT MATTERS](#)

[VIEW CLIENT INVESTMENT RESULTS \(/PERFORMANCE\)](#)

### HIGH QUALITY BUSINESSES

## Truly Selective

We believe that high quality businesses share common characteristics. They are powerful leaders in their industry. They have dominating competitive positions. These are just a few of the qualities we look for in the businesses we purchase. You can count on these to perform consistently for you no matter the current market conditions.



[LEARN MORE ABOUT SELECTIVE COMPANIES \(/PROCESS\)](#)

[Questions? - Chat Here](#)


















Our clients understand what they own and why they own it.

## Most Firms are Not Selective

The majority of mutual funds, ETFs, and advisors hyper-diversify by purchasing hundreds of businesses. This investment style guarantees average results - purchasing a mix of weak and strong companies. We believe in concentrating on our best ideas.

CLICK YOUR CURRENT FIRM BELOW TO ROLLOVER ASSETS TODAY

							
		<a href="#">(/get-started)</a>					
							<a href="#">Your firm not listed? Click here...</a>
				<a href="#">(/get-started)</a>		<a href="#">(/get-started)</a>	<a href="#">(/get-started)</a>

### GAIN BOARDROOM ACCESS

## Be treated like a business owner

At Selective, we recognize that investors are business owners. We provide a uniquely transparent view into each business you own. We treat you as a business owner, providing you with quarterly boardroom updates. These updates provide a clear and succinct picture of the underlying performance of each business. Unlike daily

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stock performance, these key performance indicators provide a more accurate reflection of the long-term value being generated by your investment.



**Watch a clip from our 2016 Boardroom Update**

## Take Our Quiz

TO SEE IF YOU ARE READY FOR RETIREMENT

**Take the Quiz (<https://selective.typeform.com/to/HvQvJf>)**

(/home)



**DISCLAIMER**  
(/DISCLAIMER)

**DOCUMENTS**  
(/DOCUMENTS)

**GIPS PERFORMANCE**  
([HTTPS://SELECTIVE.EGNYTECON/017WTP1RVO60Z](https://selective.egnyte.com/EGNYTECON/017WTP1RVO60Z))

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(/CONTACT/US)

<sup>1</sup> Past performance does not guarantee future results, and loss of principle may occur. SumZero offers a buy-side analyst performance rankings system. Their proprietary rankings algorithm examines the returns of individual investment recommendations made by thousands of fund analysts/PMs since 2008, and then identifies the individuals that have most consistently beat the market. SumZero rankings are published each month based on the performance of ideas. Rankings are calculated to highlight users with the highest risk-adjusted returns related to the market.

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four key points in the ranking methodology include risk aversion, benchmarking, quantity, and recency. This is not a guarantee of future performance. Investing contains risk and loss of original principal may occur. For more information on ranking methodology please contact [info@selectivewm.com](mailto:info@selectivewm.com)

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