



(<http://elyportfolios.com/>)

Solutions for Your Circumstances

Prudent Planning in an Uncertain World

DOES MY PORTFOLIO FIT ME?



We are Personal Financial Management Advisors

As the economic environment has grown more complex the task of managing personal finances has become more confusing and the consequences of mistakes has become more damaging. As personal financial management advisors we use our skills, the latest software tools, and a network of professionals to help our clients deal with the present and prepare for future life events.

We are Fee-Only

Our firm is an independent, fee-only Registered Investment Advisor. We are compensated only by our clients and accept no commissions or any other form of compensation from other sources. This aligns our interests with those of our clients and reduces the potential for conflicts of interest.

We are Solutions Oriented

We find prudent solutions to our clients' problems. In the typical sales-oriented approach the products are the solution. We, on the other hand, work to develop a plan that is tailored to our clients' unique individual needs and then use institutional grade investment products to implement those plans. It is a distinction that is hugely important and somewhat unique.

We are Fiduciaries

As Registered Investment Advisors we are, by law, held to a fiduciary standard that requires us to work in the best interest of our clients.

We are Risk Focused

Returns come from risk, but not all risks are worth taking. As investment advisors it is our job to identify the risks that are rewarded and to determine, for each client, how much of that risk to take. By structuring our portfolios around risks factors that are rewarded with higher expected returns, we avoid the harmful effects of speculative investing.

We are Different

We are different because we take the time to stop and stick our heads above the crowd to determine what is actually going on and to see what's coming. That's why we were ahead of the crowd when we:

- Wrote software (and began consulting) on minimum required distributions
- Acknowledged our fiduciary responsibility to our clients
- Switched to fee-only compensation from commissions
- Advocated low cost index investing instead of higher cost active investing
- Published a book on the prudent fiduciary process
- Implemented tax efficient asset location strategies

Uncertainty is a Certainty

Fables for Fiduciaries

You can't always be right. As a fiduciary, you must be prudent. The Uniform Prudent Investor Act describes prudence as a process with clearly defined duties that are the legal standards by which a fiduciary is judged. Even though being a fiduciary is a very serious legal obligation this book actually makes learning how to be one fun.

ORDER THE BOOK (<http://www.uncertaintyisacertainty.com>)

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Those who have knowledge, don't predict. Those who predict, don't have knowledge.

Lao Tzu

(<http://elyportfolios.com/>)

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SERVICES

PARTNERS

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CONTACT

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