



(<https://www.weatherstonecm.com/>)

The Weatherstone Difference

Most investment management companies build portfolios that require you to ride through painful, often prolonged market declines in order to receive the long-term benefit of their strategies. We believe in measuring risk and reward in the markets on a weekly basis, and adjusting the asset allocation as needed, and moving fully to cash if conditions are negative for investment assets.



What We Believe

An overview of why we manage money the way that we do.

[READ MORE](#) → (what-we-believe/)



How We Make Decisions

Take a high level overview of how we determine when to allocate for growth, and when to move to defensive allocations.

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How Our Process Benefits You

There are advantages and disadvantages to any investment strategy. Let us walk you through our process to determine if it is beneficial for you.

[READ MORE](#) → (how-our-process-benefits-you/)

Investment Strategies

We recognize that while investors are happy making money, they are even more unhappy losing money. Because of this, Weatherstone offers a tactical approach to managing your investments. This method is different from the strategic asset allocation. Instead of rebalancing the portfolio on a quarterly or semi-annual basis to a preset asset allocation, Weatherstone will monitor your investments as frequently as daily and adjust the asset allocation as needed. This approach incorporates a buy and sell discipline with the goal of reducing the severity of market losses while still allowing the portfolios to shift into the markets to participate in the advances.

[View our Tactical Programs](http://weatherstonecm.com/investment-tactical-public/?filter=Conservative) → (http://weatherstonecm.com/investment-tactical-public/?filter=Conservative)

A strategic approach to investing is designed to capture the broad market moves, which over a longer time horizon, has delivered strong return potential to investors who adhere to the discipline. The strategic or "buy-and-hold" approach advocate for a more efficient market where new information is instantly accounted for. Broad diversification is a key element of the Weatherstone strategic portfolios given that the asset allocation does not change frequently. This diversification spreads the market risk, which helps take emotion out of the equation for investors who are nervous about changing conditions.

[View our Strategic Programs](http://weatherstonecm.com/investment-strategic-public/?filter=Strategic-Active) → (http://weatherstonecm.com/investment-strategic-public/?filter=Strategic-Active)

About Us

Weatherstone was founded in 2001 by Michael Ball. He used a tactical investing approach with his clients that appealed to other financial advisors. While a relatively unknown management style at the time, tactical management became an ever growing aspect of Weatherstone Capital Management.

[Disclosures \(https://www.bbb.org/overview-of-bbb-ratings\)](https://www.bbb.org/overview-of-bbb-ratings)

Our staff provides dedicated support to financial advisors and their clients. Weatherstone has become a recognized and reliable partner to some of the Country's largest independent broker/dealers and registered investment advisors. Weatherstone has been an A+ Accredited Business of the Better Business Bureau since 2002.

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Weatherstone in The News



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