Welcome to AMP Investment Management

Striving to achieve stable, consistent returns in varying market conditions

About Us

Comprehensive Approach

It is our view that achieving investment success is the result of a disciplined investment management process, concentration, and insightful flexibility. AMP Wealth Management (AMP) has been assisting clients reach their financial goals since 1994. Our diversified strategies are built on rigorous research and analysis. Periodic portfolio adaptations are made utilizing this AMP developed structure. Through this process AMP seeks to provide stable, consistent returns in varying market conditions.

The firm was founded by Dr. Jerome Mahalick to provide fellow medical and dental professionals with an academically based investment alternative. The firm initially developed Quantfolios (risked based mutual fund allocations) that would adapt to the market environment. Subsequent to that The Income Generating Portfolio, (enhanced fixed income management) was developed in 1997. In 2006 AMP formulated the Rising Dividend Strategy. This equity strategy was incorporated to capitalize on the unique characteristics of strong dividend paying companies with sound business principals.

Our Process

The AMP Investment Management Process is managed by a three person investment team consisting of Dr. Jerome Mahalick, Gregory Mahalick and James Breen. As the firm founder, Dr. Mahalick serves as the lead portfolio manager and chairman of the investment committee. Additionally Dr. Mahalick leads the team's effort in the integration of quantitative and qualitative research. Gregory Mahalick leads the team's efforts in the integration of economic research and James Breen coordinates the team's efforts in the integration of market structural research and the application of enhanced decision procedures.

As the firm has matured, it has increasingly provided its services to other financial institutions and advisors as an independent third party asset manager.

Investment Team

Dr. Jerome Mahalick, CEO

Dr. Mahalick is the founder and CEO of Asset Management for Professionals Inc. (AMP) In 1994, Dr. Mahalick completed the Certified Investment Management Consultant curriculum and formed AMP, a SEC Registered Investor Advisor. Dr. Mahalick is a board certified prosthodontist. He graduated with a DDS and MS from Marquette University School of Dentistry. After two years in the Army Dental Core he returned to Milwaukee to practice for twenty eight years. During this time he served as Chairman of the Asset Management Committee for the Wisconsin Dental Association and was on the board of directors of Standish Industries.

Gregory Mahalick, Partner

Gregory received a Bachelor of Science degree in Nuclear Engineering and Engineering Physics from the University of Wisconsin and a MBA from Marquette University with a focus on investment finance. He began his career as a submarine officer in the United States Navy. This included tours from San Diego on the USS Pasadena deployed in the Persian Gulf and in the shipyard at the General Dynamics in Groton, CT where he was involved in the new construction and commissioning of the USS Wyoming. After the Navy, Greg moved to GE Healthcare where he spent 10 years in a number of management roles in engineering and product development, in diagnostic imaging modalities, CT and Ultrasound. His last position there was as a global product manager in the Pre-Clinical Imaging business, an entrepreneurial group within GE Healthcare responsible for developing products for biologic research and drug discovery. Gregory joined AMP as a partner in 2006.

James Breen, Partner

Mr. Breen received a BS from Northwestern University and a MBA from the Kellogg Graduate School of Management at Northwestern University. Jamie Breen has over thirty years of experience in investment management, business management and consulting. Prior to joining AMP, Jamie led the ERISA effort for Horizon Investments, LLC. Before Horizon, Jamie was Co-Founder and President of Breen Financial Corporation. Prior to Breen Financial, Jamie was Senior Vice President of LCG Associates. He was also Senior Vice President at Disciplined Investment Advisors. Mr. Breen has helped develop curricula and lectured on pension fund management for the Kellogg Graduate School's Continuing Executive Education Programs and has published articles on a variety of quantitative investment subjects.

Our Strategies

Rising Dividend

The AMP Rising Dividend Strategy is managed by a three person investment management team consisting of Dr. Jerome Mahalick, Gregory Mahalick and James Breen. Although most similar to a value portfolio, dividend investing is not a subset of traditional investment styles, it is a strategic style unto itself. Dividend companies are solid, reliable engines of growth with long and great histories. The value of stocks are related to positive corporate dividend policies, earnings and payout reliability.

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Income Generating

The AMP Income Generating Portfolio provides an investor with long term investment security by maintaining principal and providing a steady stream of income. The Income Generating Strategy also serves as an excellent complement to the Rising Dividend Strategy to enable AMP to provide a suite of Risk Based Investment Strategies which span the relevant risk/return landscape. The investment management committee meets on a regular basis to determine if portfolio changes are indicated.

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Quantfolios

A **Quant*folio*,** **Quant**itative Port***folio***, is a portfolio of mutual funds created utilizing a proprietary, quantitative and qualitative process for selecting and combining each investment. Quant*folio*s adapt to market changes and reduce risk.

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Retirement Plans

Rising Dividend CIF

We believe Collective Investment Funds are the most efficient way to manage qualified plan money. In fact collective funds were the vehicle of choice for retirement plans due to their low cost structures. We have partnered with Alta Trust to offer our Rising Dividend Strategy in a collective investment fund.

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Quantfolios

We have partnered with Mid-Atlantic Trust Company to offer our managed Quantfolio models through the ManagerxChange℠. This platform provides investment advisors with access to our managed models seamlessly available in the 401(k) plan environment.

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EcoMatrix®

EcoMatrix®: DEFEATING THE BEAR; RIDING THE BULL

The **EcoMatrix®** is the guiding light for our active management process. The EcoMatrix is an analytical investment management tool used toevaluate changing market conditions**.** This process enables AMP to adjust its management strategies with a goal to maximize investment results in both Bear and Bull markets.

Our proprietary matrix provides insight into volatile market conditions including economic data, stock market performance, and monetary policy. This information provides the means for us to modify our management strategies in an effort to minimize downside in a recessionary bear market and capture positive returns in a rising bull market.

JUNE COMMENTARY:

Trade tensions continue to contribute to the recent market volatility. While the EcoMatrix remains slightly below its long term average, we continue to see some slow down in consumer spending and industrial numbers.

EcoMatrix - June 19 (pdf)

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Hours

Monday - Friday: 9am - 5pm
Saturday: By appointment
Sunday: Closed

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