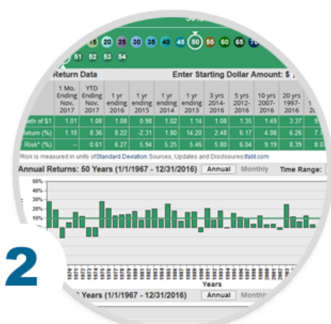
Get Started with IFA In 3 Simple Steps

Determine your Risk Capacity & view your matching Index Portfolio



Review the performance of evidence-based index portfolios

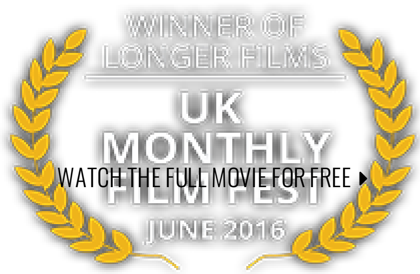
Open an Account, and
a Wealth Advisor will contact you

What's New at IFA

Latest Videos

eMoney and IFA Financial Planning
Thursday, June 13, 2019

Latest Articles

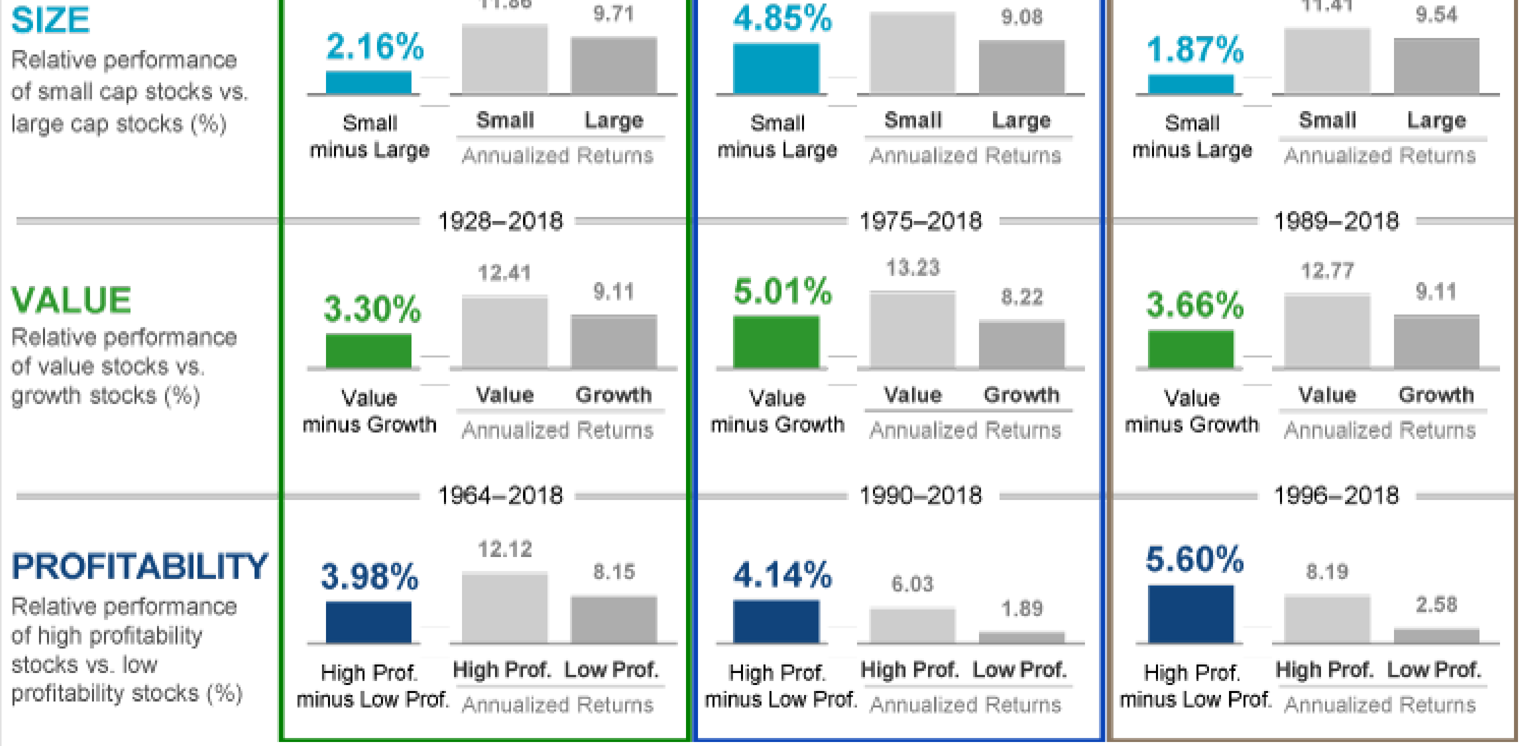


Favorite Charts

IFA's extensive collection of charts presents a wealth of data supporting the benefits of investing with IFA. The data provided in all charts on this page is hypothetical backtested performance and is not actual client performance. Only data for the IFA Index Portfolios is shown net of IFA's highest advisory fee and the underlying mutual fund expenses. All other data, including the IFA Indexes, does not reflect a deduction of advisory fees. None of the data reflects trading costs or taxes, which would have lowered performance by these costs. See more important disclosures at ifabt.com.

Dimensions of Returns

Up to 91 Years* (1/1/1928 - 12/31/2018)



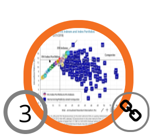
Information provided by Dimensional Fund Advisors LP.
All returns are in USD. Premiums are calculated as the difference in annualized returns between the two indices described over the period shown. MSCI indices are gross div.
For US stocks, indices are used as follows. Small Cap minus Large Cap: Dimensional US Small Cap Index minus the S&P 500 Index. Value minus Growth: Fama/French US Value Research Index minus the Fama/French US Growth Research Index. High Prof minus Low Prof: Dimensional US High Profitability Index minus the Dimensional US Low Profitability Index. For developed ex US stocks, indices are used as follows. Small Cap minus Large Cap: Dimensional International Small Cap Index minus the MSCI World ex USA Index (gross div.). Value minus Growth: Fama/French International Value Index minus the Fama/French International Growth Index. High Prof minus Low Prof: Dimensional International High Profitability Index minus the Dimensional International Low Profitability Index. For Emerging Markets stocks, indices are used as follows. Small Cap minus Large Cap: Dimensional Emerging Markets Small Cap Index minus MSCI Emerging Markets Index (gross div.). Value minus Growth: Fama/French Emerging Markets Value Index minus Fama/French Emerging Markets Growth Index. High Prof minus Low Prof: Dimensional Emerging Markets High Profitability Index minus the Dimensional Emerging Markets Low Profitability Index. Profitability is measured as operating income before depreciation and amortization minus interest expense, scaled by book.
Indices are not available for direct investment. Index returns are not representative of actual portfolios and do not reflect costs and fees associated with an actual investment. Past performance is no guarantee of future results. Actual returns may be lower. See "Index Descriptions" in the appendix for descriptions of Dimensional and Fama/French index data. Eugene Fama and Ken French are members of the Board of Directors of the general partner of, and provide consulting services to, Dimensional Fund Advisors LP.

Past performance does not guarantee future results. Data is provided for illustrative purposes only, it does not represent actual performance of any client portfolio or account and it should not be interpreted as an indication of such performance.

Risk vs. Return

Multi-Period Index Returns

Risk Return Scatter Plot



Why

Diversify

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Roller Coaster

Distributions

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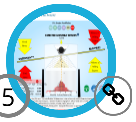

Random Walk

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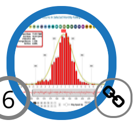

Distribution Monthly

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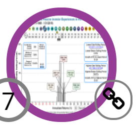

Histograms of SPIEs

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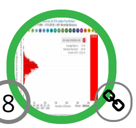

Distribution Monthly

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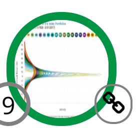

Estimated Distributions

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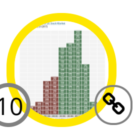

Historical Returns

Research

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Dimensions of Returns

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Performance of Premiums


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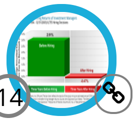
t-Stat of Alpha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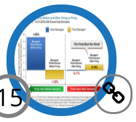
Before & After Hiring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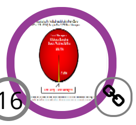
Manager's Performance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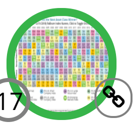
Stock Picking Skill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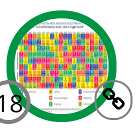
Style Drifters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Industrial Rotation


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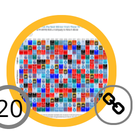
Country Rotation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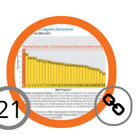
Stock Rotation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Forecast Accuracy

Comparisons

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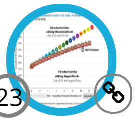
Vanguard vs Dimensional



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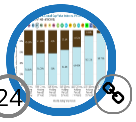
Vanguard vs DFA



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Index Comparisons

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Pos vs Neg Returns

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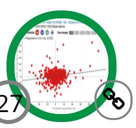
Compare Portfolios



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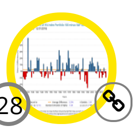
Predictability of Returns



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Index Portfolio 100 minus S&P

IFA Awards and Accolades

See the various awards we've received from *Forbes, Barron's, Financial Times, and Financial Advisor Magazine*

More Accolades and Awards

Forbes
Best-In-State Wealth Advisor Southern California 2019
Mark Hebner

The Forbes ranking of Best-In-State Wealth Advisors, developed by SHOOK Research, is based on an algorithm of qualitative criteria, mostly gained through telephone and in-person due diligence interviews, and quantitative data. Those advisors that are considered have a minimum of seven years experience, and the algorithm weights factors like revenue trends, assets under management, compliance records, industry experience and those that encompass best practices in their practices and approach to working with clients. Portfolio performance is not a criteria due to varying client objectives and lack of audited data. Neither Forbes or SHOOK receive a fee in exchange for rankings.

Financial Advisor Magazine
Top 275 RIAs of 2018

$1 Billion and Over Asset Category

Members of this list are ranked by total assets under management, must be independent registered investment advisors and file their own ADV statement with the SEC. Firms must have at least $50 million in assets under management as of December 31, 2017 and they *must provide financial planning and related services to individual clients. Corporate RIA firms, investment advisor representatives (IARs) and hybrids are not eligible for this ranking.*

Financial Times
Top 300 RIAs of 2018

Members of this list were assembled using scoring based on six broad factors, including areas of consideration such as AUM, asset growth, company age, industry certifications, SEC compliance, and online accessibility.

Barron's
Ranked #104 Financial Advisors in California 2019
Mark Hebner

The rankings are based on data provided by over 4,000 of the nation's most productive advisors. Factors included in the rankings: assets under management, revenue produced for the firm, regulatory record, quality of practice and philanthropic work. Investment performance isn't an explicit component because not all advisors have audited results and because performance figures often are influenced more by clients' risk tolerance than by an advisor's investment-picking abilities.

Fiduciary Wealth Services

IFA offers customized investment management and portfolio strategies alongside online planning and referral services for a better overall client experience. An experienced IFA Wealth Advisor provides personalized advice to help clients achieve their long-term financial goals.

- Investment Advisory
- Tax Planning & Accounting
- Financial Planning
- Retirement Planning
- College Planning
- Social Security Optimization
- Charitable Giving Services

Referral Services

- Insurance Services
- Trustee Services

Real Advisors, Real Advice

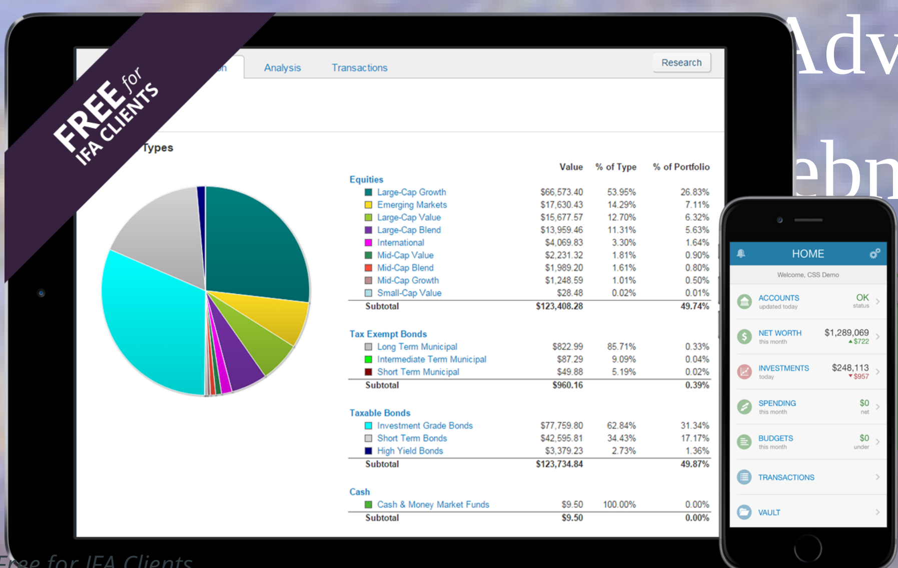
Robust Financial Planning

IFA Financial planning utilizing eMoney is robust technology where IFA clients can keep their financial accounts, investments and spending organized in one easy-to-use personal financial management dashboard, and dedicated IFA Wealth Advisors can in turn produce comprehensive and personalized financial plans.

Learn More

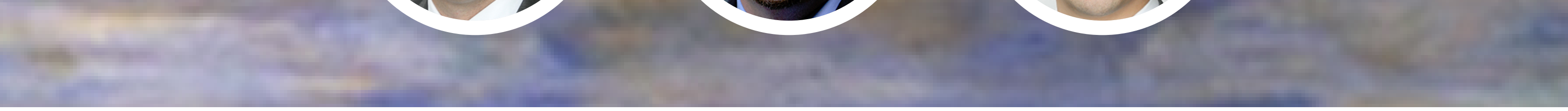
Advisor

ebner



Hebner

Free for IFA Clients



Learn About an Evidence-Based Approach to Investing

Investing Kit

An Evidence-Based Approach to Investing

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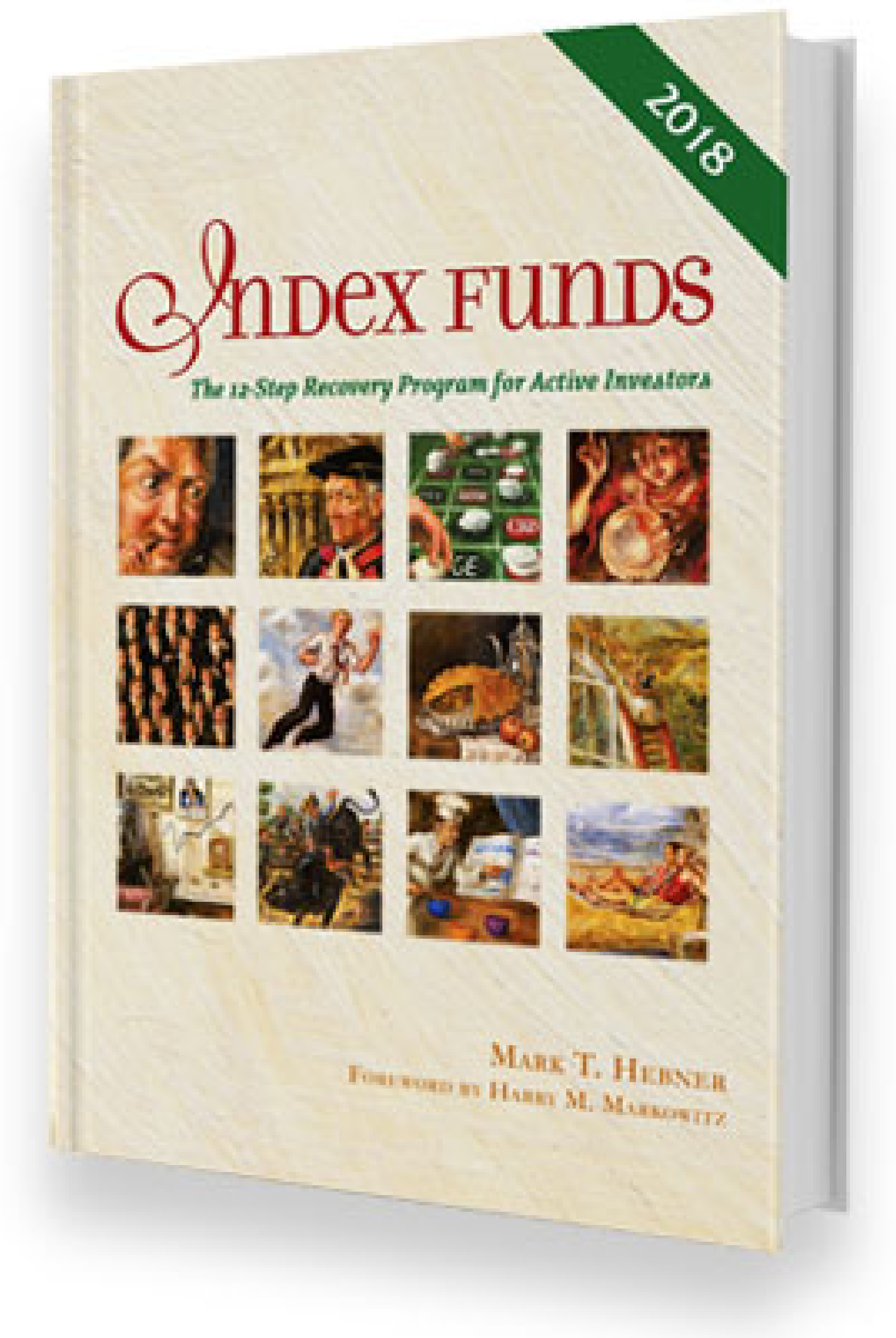
Available at amazon



Index Funds BOOK

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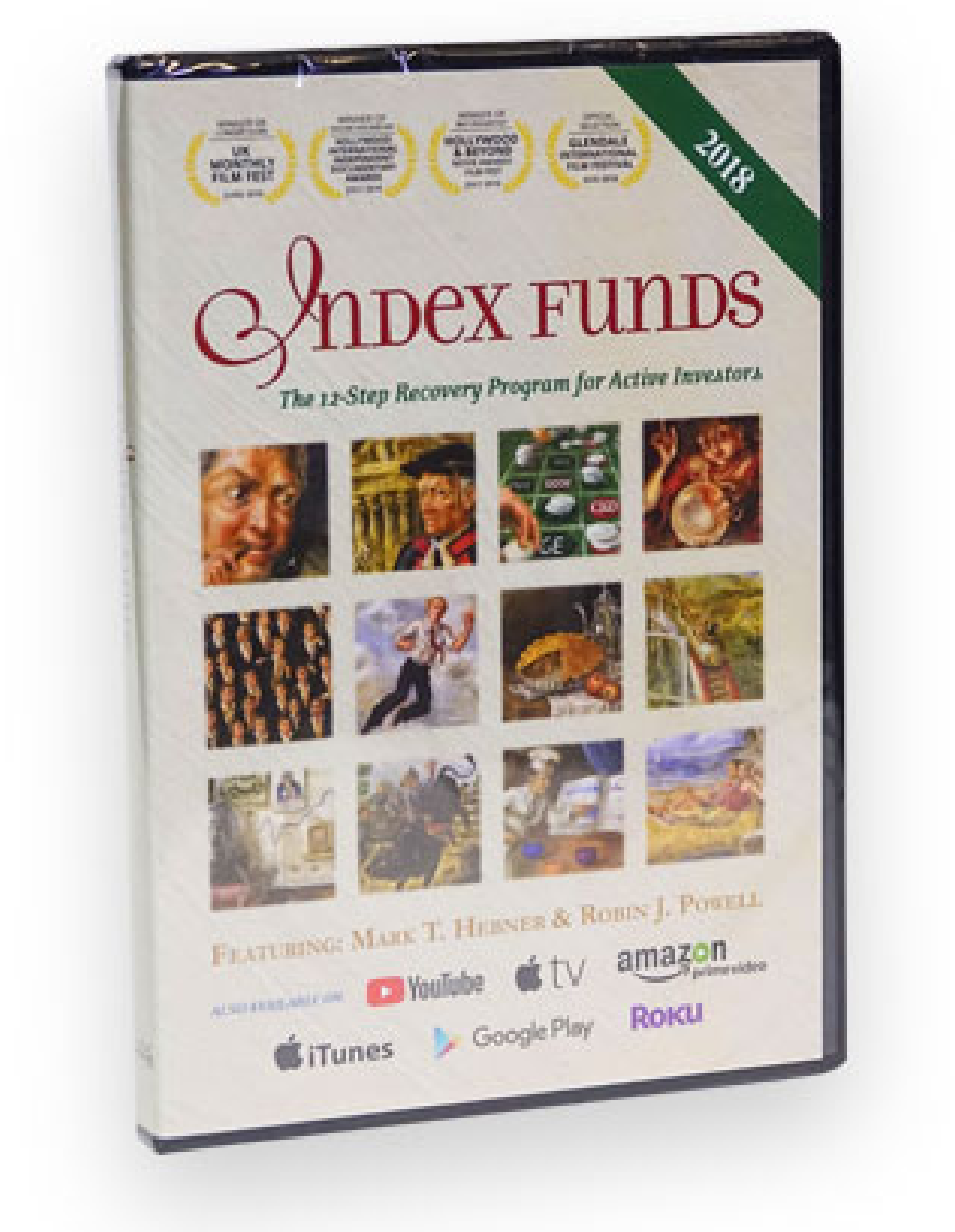

Index Funds DVD

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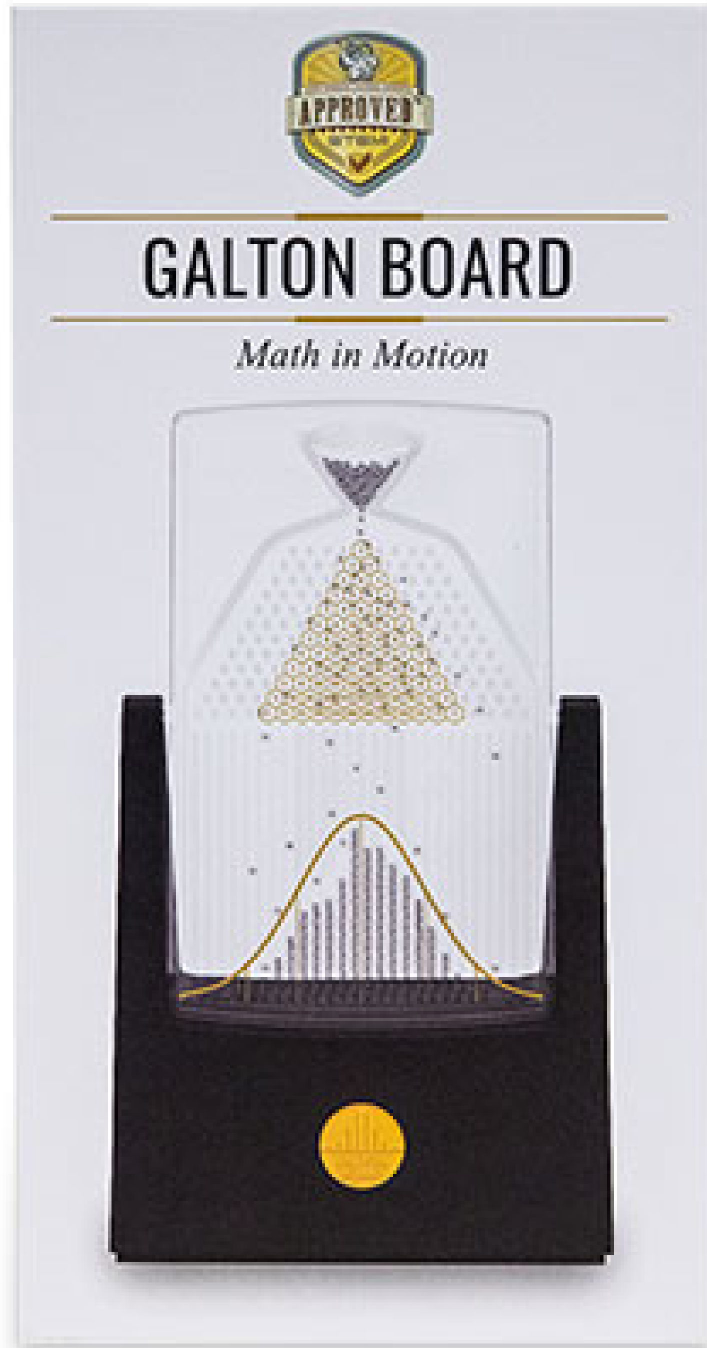

GALTON BOARD

Math in Motion

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Learn more about IFA Taxes, click here