## DISCRETIONARY MONEY MANAGEMENT SINCE 1973

Windsor Securities, Inc. is a SEC-Registered Investment advisor which has managed client assets on a discretionary basis since 1973. Windsor uses proprietary mathematical strategies to discern the probability of broad-market short-term moves in either equities or bonds. Windsor invests assets through frequent re-allocation among index mutual funds, or Exchanged Traded Products (ETFs), or variable sub-accounts of annuities and life insurance contracts. Our objectives are to attempt to achieve increased Alpha and reduced Beta; capital growth uncorrelated with equity, bond, and CTA indexes; absolute returns in all market scenarios; and added-value diversification to portfolios with other assets. With Separately Managed Accounts at independent custodians, clients enjoy transparency and safety while also avoiding the extra expenses of administrators incurred in other account structures. Unlike many managers, who often charge both a fixed management fee PLUS a performance fee, Windsor's client accounts are managed for a flat fixed fee. Qualified clients may choose between a fixed fee or performance based fee.

Learn More

## SEC registered investment adviser | Ardmore, Pennsylvania

## LONGEVITY

Many managers are untested in diverse market climates over long time periods, focus too much on raising assets, fail to implement robust infrastructures, and ultimately do not survive. **Windsor stands apart, and has been active and regulated by the SEC for 40+ years.**

Learn More

# RELIABILITY

Windsor's investing approach is systematic and we understand that it takes more than capital and a brilliant idea to achieve and maintain long-term success. Over many years we have built a durable operational, trading and risk management infrastructure that is led by visionary leaders and empowered by an energetic and dedicated organizational team.

Learn More

# FAMILY OFFICES

As a tenured family office, we have a deep understanding of the unique needs of other single and multi-family offices, and high net worth individuals. We can execute our strategies on several platforms, including but not limited to mutual funds, variable annuities, and variable life insurance products. Contact us to learn how our strategies can be deployed for you and your family.

Learn More