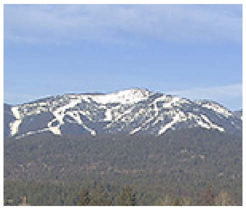
Portfolio Growth and Wealth Preservation



SFM Office
view of Big Mountain

View Live Stream

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Personal Q&A with Jim Stack

James Stack, CEO of Stack Financial Management (SFM), was recently featured in an interview with *Barron's*. The Q&A session focuses on the history of our firm, outlook on the market, and how SFM portfolios are currently positioned. Our team is proud to serve the clients of SFM, and we are excited to share a little bit of our story. Click the *Barron's* image at right to read the full article.

BARRON'S WebReprint

Welcome to Stack Financial Management

> *The foundation of Stack Financial Management's investment philosophy is a belief that portfolio allocation must be based on a careful assessment of market risk. Through diversification and careful attention to the forces that move the market, Stack Financial Management utilizes a "safety-first" approach to money management that is designed to maximize both profits and safety.*

One of the most respected money management firms in the United States

Nestled on the shores of Whitefish Lake in beautiful northwest Montana, Stack Financial Management (SFM) is far from Wall Street, but has earned a reputation as one of America's premier investment advisors.

In September 2018, Stack Financial Management was named to ***Barron's*** list of the "Top 100 Independent Wealth Advisors" in the United States. This marks the 11th recognition for James Stack and his team by the financial publication, which began vetting the top firms in the country 12 years ago. James Stack, president and founder, was also one of five advisors profiled in the August 29, 2016 issue of ***Barron's***.

2018 also marks the first time ***Forbes*** named SFM among "America's Top Wealth Advisors" in the United States.

Please Click Here for Important Rankings Disclosure Information

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Special Video Presentation for SFM Clients
Join James Stack and the Stack Financial Management Portfolio Management Team as they share the most valuable lessons from the past 100 years of Wall Street history -- starting with the 1929 Crash, and including the Go-Go Fund mania of the 1960s, the Nifty-Fifty era of the 1970s, the 1987 Crash, 1990s Tech Bubble and, most recently, the 2008 Financial Crisis and Housing Bubble. This 50-minute video exposes the historical mistakes that have devastated investor portfolios in the past. And more importantly, it reveals how we are using this vital knowledge and research to help protect client portfolios in today's aging bull market.
To watch this video, click on the image below and select the icon in the right corner to view full screen:

52:12

For a complete overview of Stack Financial Management, our investment philosophy, and the services available to you as a SFM client, we invite you to explore the links below...

- SFM utilizes the same philosophy and technical indicators developed by InvesTech Research over the past 40 years. Review our Investment Philosophy for more information about how assets are managed at Stack Financial Management.
- SFM's dedicated team of professionals has over 90 years combined portfolio management experience. Meet the SFM Portfolio Management Team and learn more about their background and credentials.
- SFM offers professional asset management services, using a time-proven strategy that reduces portfolio exposure when market risk is high.
- SFM manages accounts for individual clients, corporations, trusts and retirement plans throughout the United States. Click here to view a map showing the geographical location of current clients.
- SFM offers Capital Appreciation or Value & Dividend portfolios to suit your personal investment profile. Learn more about these Account Options.
- SFM is your choice for individually tailored financial management services you can trust. Click here to request a free Wealth Protection Kit, including our Special Report, *3 Secrets to Protecting Your Portfolio in Any Market*.

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