

**Innovative thinking, entrepreneurial spirit and  
a  
client-first philosophy.**

## **Who We Serve**

### **Institutional Investors**

*Let's Better Tomorrow, Together*

Foundations, financial institutions, public entities, corporations, non-profits and other organizations have been benefiting from the financial experience of the SJS team since 1995. They have come to recognize the value of having an ally that bridges the gap between mission and means, advice and action, promises and partnership.

## **Individual Investors**

*Let's Plan Your Future Together*

If you have questions about your future and your finances, we're here to help you find answers. You've worked hard, saved for your retirement and when it's time to enjoy it, you deserve the peace of mind so you can.

## **The SJS Difference**

**MEET THE TEAM**

[< Previous](#)

[CLOSE](#)

## **Get to Know SJS**

SJS Investment Services has been advising people, families, organizations and communities, managing their assets, and in general, being there for them since 1995. Unlike so many companies that think a sound investment philosophy and a track record is all it takes, we know that gets you in the game, but not much further. We share the time-tested investment philosophy of the University of Chicago's Eugene Fama, 2013 Nobel Laureate (Economics) and his colleague Kenneth French, of Dartmouth College, and have more than \$2 billion\*\* in assets under management. But most important, we bring major money center investment experience to you through MarketPlus Investing<sup>®</sup>, and a team of people whose

[Next >](#)

small-town values put you first, all the time, every time. That's what sets SJS Investment Services apart.

\*\*as of 3/31/2019

## Discover the SJS Difference

People tell us we're not like other investment management firms. They say that while we focus on the money side of what we do, we focus on the people side too, and that's unusual. If every other company forgets to put you first, if that makes us different, then we're happy to be different.

### How We Work With You

"You come first. All the time. Every time." It isn't just a slogan. It's how we live our lives. It's how we were raised. Our first meeting is all about getting to know you, you getting to know us, and understanding expectations. Ours is a relationship business first and foremost. Taking care of you is what we do.

**“Answering questions, helping you find the information you need, you name it. Whatever it takes we are there.”**

– Jeff Yost, Director, Client Services – SJS Investment Services

# Why Buy the Market When You Can Buy the Market...Plus?

MarketPlus Investing<sup>®</sup> from SJS Investment Services is our science-based process of structuring investment vehicles and designing portfolios to help you achieve your specific financial goals through the use of institutional-class mutual funds.

## **The Four Core Fundamentals**

1. Markets are efficient and are priced fairly.
2. Speculating is futile.
3. Global stocks and bonds have rewarded investors over the long term.
4. Portfolio design matters most.

## **Monitoring, Managing and Adjusting**

Reviewing your portfolio regularly, making and rebalancing decisions to stay true to your goals and your risk tolerance is just part of the ongoing work we do. We'll analyze the more complex considerations like evaluating changes to your asset classes and determining whether or not new investment offerings are viable opportunities.

## **Portfolio Design is Everything**

MarketPlus Investing is simple and easy to understand, but the complexity is in the portfolio design, implementation, monitoring and management. That's where our wisdom, experience and discipline count.

## *MarketPlus Investing<sup>®</sup> and You*

### **Understanding MarketPlus Investing**

MarketPlus Investing starts with a comprehensive market-wide investment structure, then builds upon it with a carefully designed mix of equities, bonds and other global investments weighted to match your desired investment goals, risk tolerance and timeframe through the use of institutional-class mutual funds.

## **Guiding Your Future**

SJS has spent years honing the skill of portfolio design and continues to sharpen every aspect of it through leading academic models, applied market trend analysis and ever-changing key indicators. This is not a one-and-done endeavor. It's continual —with you, for you—based on these principles:

Your portfolio will be diversified across and within asset classes, industries and securities worldwide providing you the inherent risk-management benefits of diversification.

You'll see a portfolio designed for lower turnover leading to lower transaction costs. We are accountable to your net returns, so we have every incentive to be smart about costs.

### **Calculated Risk Exposure**

Your assets will be invested where better returns have historically occurred and where market indicators imply they will continue.\*

### **Third-party Custodian**

Your money will be managed by us, but for your peace of mind, physical custody is with a qualified independent custodian of your choice. They verify your assets whenever you log in to your account or upon receipt of your monthly statement.

*\*Multifactor Asset Pricing Model and Value Effect, Eugene Fama and Kenneth French, University of Chicago, 1992.*

# **Make a Difference**

[← Previous](#)

[CLOSE](#)

[Next →](#)

Putting people first and bettering their lives. That's the driver and the motivator at SJS. We are continually inspired by the clients we serve, their lives, their achievements and their own giving spirit. We at SJS are dedicated to making a difference to them. To tell the stories about their extraordinary lives and the difference they have made on the world and us. We think you'll find them as inspiring as we do.

## Bettering People's Lives, Bettering Communities

Serving communities while serving people is front and center at SJS. And when we work in your community, we give back to your community through programs that better the lives of people, provide educational opportunities for children in need and make towns and cities better places to live.

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[← Previous](#)

**CLOSE**

[Next >](#)

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