



RIG

Robinson Investment Group

Robinson Investment Group (RIG) is a Registered Investment Advisor serving individuals, retirement plans, and financial institutions with offices in Brentwood, Tennessee. Its principals currently manage more than \$89 million, providing individual investment plans based upon written, client-specific investment objectives. Robinson Investment Group was established in 1996 in Nashville, Tennessee. The firm began as a subsidiary of Nashville Capital Corp. in 1990.

Newsletter

July 1, 2019

Happy Fourth of July, 2019! America, the Beautiful America will celebrate its 243rd Birthday this Thursday. As

we enjoy the summer time festivities

April 1, 2019

March Madness is coming to a close. We have completed a remarkable quarter as the S&P 500 rallied from its

December 24, 2018

we enjoy the... time...
this week, we should count our blessings of religious freedom and economic freedom to live in the greatest country in...
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2416 to its present 2828 level recording an approximate 17% gain. Over the course of the last 30 years we...
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January 1, 2019

The New Year greets us with the sobering reality that the financial markets have declined around the world. The Federal Reserve has reduced monetary reserves over the past eighteen months leading to a less accommodative money supply growth. The animal spirits of...
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Investment Philosophy

Equity Philosophy

Fixed Income Philosophy

Our investment philosophy is based on a **TOTAL RATE OF RETURN** or **VALUE concept** which gives consideration to income as well as capital appreciation over the longer term.

Implementation of our investment philosophy calls for the identification of risk areas, and of appropriate actions required to protect principal values. This approach emphasizes that economic, business, and stock market cycles cannot be ignored. Continually changing trends in business activity inevitably lead to changing trends in equity and fixed income markets. Simply stated, the stock and bond markets clearly are a reflection of economic activity and do not function independently of one another.

Investment strategy and policy are developed through group interaction in which the individual investment manager tests his interpretations and ideas against fellow professionals.

We manage portfolios, not just stocks and bonds. We utilize a **FULLY MANAGED APPROACH** which blends a broad list of investments within three general classifications – equity, fixed income, and reserves. Our basic belief is that these three areas of investments should be blended in differing proportions over a cycle in order to accomplish our investment goals. Our investment goals are:

- * Protecting Capital
- * Preserving Purchasing Power
- * Increasing Long-Term Rate of Return

Equity, fixed income, and reserves are stated in percentage ranges to accommodate our approach. Investments within each of these three categories are actively managed in order to produce a higher rate of return to the portfolio. We believe this philosophy will produce the investment results most beneficial to our clients.

CLIENT-SPECIFIC STRATEGIES: It is this client-specific approach that separates Robinson Investment Group from most other investment managers. No single investment strategy can be appropriate for every investor; the resulting “cookie cutter” plan is not likely to meet any investor’s needs exactly. Robinson Investment Group listens to each client’s goals, preferences and concerns, then responds in the most appropriate way consistent with sound financial practice.

INVESTMENT MANAGEMENT SERVICES: Robinson Investment Group is not a broker, but serves as an investment manager through a simple agency agreement authorizing them to make investments on their client’s behalf. This agreement provides clients with separate accounting of all assets and transactions. It also removes any bias that might arise from commission-based fees. All fees are determined solely as a percentage of assets under management.

Management Team

Russell L. Robinson,
President

B.S., University of Alabama

Has worked with investments since 1983.
Worked for several leading Financial
Institutions including the Tennessee
Consolidated Retirement System and Nations
Bank.

Paul Heer
Principal and CPA

B.S., University of Notre Dame

Has worked with investments since
1968, including 18 years at SunTrust Bank,
Nashville where he managed \$650 million in
employee benefit assets and \$100 million in
personal trust assets Member of the Finance
board of the Catholic Diocese since 1973
Chairman of Investment Committee of the
Catholic Diocese since 1995 Member and
former Officer/Board Member of the
Nashville Society of Financial Analysts

Amy D. Wells

Vice President and Senior Portfolio Manager

B.A., University of Tennessee

Has worked with investments since 1984, including 10 years in Trust Investments with SunTrust, Nashville. Amy is a graduate of Southern Trust School, Board Member of Residential Services, Inc. and Treasurer for the McLeroy Foundation.

Trent C. Green

Vice President

B.S., David Lipscomb University

Has worked with investments since 1996, including six years with Prudential Securities and three years with Morgan Stanley.

Equity Management Fees

FIRST \$5,000,000	1.0% of Assets Under Management
NEXT \$5,000,000	0.5% of Assets Under Management
OVER \$10,000,000	0.35% of Assets Under Management

Fixed Income Fees

0.50% of Assets Under Management

U.S. Financial Data

Economic Research

Investment Concepts

Now and the Futures

National Economic Trends

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