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The Science of Protecting Wealth

PTS Asset Management is a Registered Investment Advisor established in 1990. Our founding partners have decades of investment experience. PTS clients enjoyed success in the late 90s thanks to our being fully invested in stock and bond funds during much of that time. For the first few years of the new millennium we received recognition for having positioned clients in the safer money market funds for most of the period.

We specialize in reducing the risks associated with investing. PTS provides our management to high net worth individuals, families, institutions, and non-profit organizations.

PTS combines the blending of two risk reduction techniques: the proven method of asset allocation, combined with the discipline of proactive asset management.

Our dual mission statement is to:

Participate in Rising Markets

Preserve in Declining Markets

Our service is offered through a nationwide network of professional financial advisors, brokers, and agents.

Making clear choices in asset management starts with you...



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