FMI
FINANCIAL MANAGEMENT INC.
RETIREMENT | PLANNING | INVESTMENTS

Listen First | Build Wealth | Secure Futures

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Our purpose is to develop a financial management practice based on personal service and portfolio performance.

"Listen First, Build Wealth, Secure Futures"

established in 1997

Purpose/Mission:

To develop a financial management practice based on personal service and portfolio performance.

Relationship Philosophy:

Building strong and lasting relationships with our clients is our top priority and we do so by following our firm's motto throughout the entire client experience. "Listen First, Build Wealth, Secure Futures".

Investment Philosophy:

Our objective is to invest your portfolio so that it will grow in value and yield the return you seek with the lowest possible

diversification, in other words, the allocation of your portfolio among different asset classes. Simply stated, depending on your situation, your money is invested in a variety of stocks, bonds, mutual funds and ETF's and then rebalanced periodically.

Investment Decision-Making:

Being diversified among asset classes does not mean living with low returns; rather, it delivers better volatility-adjusted returns. In addition, we believe: that portfolios should be rebalanced periodically in order to maintain a long-term chosen asset allocation (that can change when financial objectives change over time); that over the long-term common stocks outpace income investments (their higher expected returns are coupled with compounding interest); and that reasonable expenses and tax efficiency are important to total return.

Investment Research:

Our client portfolios are designed using in-depth asset class research and mutual fund

funds, exchange-traded funds, along with individual stocks and bonds to build your portfolio and monitor it against established benchmarks.

We are an Independent Registered Investment Advisor serving a discerning

for your risk tolerance?

Take our short survey to find your risk number.

FIND YOUR RISK NUMBER

We *can't wait* to see you.

CONTACT US

FMI Cares

we proudly support

FMI is an SEC registered investment advisor located in Ardmore, OK. FMI and its representatives are in compliance with the current filing requirements imposed upon SEC registered investment advisors by those states in which FMI maintains clients. FMI may only transact business in those states in which it registered or qualifies for an exemption or exclusion from registration requirements.

Past Performance Does Not Guarantee Future Performance

Past performance of benchmark indexes, mutual funds, actual portfolios, or composites of actual portfolios does not guarantee future results. No assurances or guarantees can be given or implied concerning future investment results for Financial Management Inc. (FMI) or any investment index. Future returns may

DOL DISCLOSURE

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