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Complete Fund and Growth Performance History

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Frequently Asked Questions...

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As an investment advisory firm, we are regulated by a [strict fiduciary standard](#) to work in the best interest of our clients– unlike brokers, who must adhere only to the suitability standard in investment choices.

We receive no commissions in exchange for recommending certain investments. We provide only objective advice, tailored to client needs. It's that simple.

Please see our update written in 2009, at the market bottom:

[*Reports of the Death of Equities: Greatly Exaggerated*](#)

A version of this update was also published in the [*Huffington Post*](#).

Our firm employs a global approach, searching for opportunity throughout the U.S., Europe and Asia.

We have an established, long-term [performance history](#) built through the many different challenging economic and market cycles over the past thirteen years.

Our client assets and accounts are held securely at Charles Schwab & Company, Inc., one of the largest independent custodians and brokerage firms.

We hope you find our website a useful source of information on investment topics.

Also posted is a description of our separate portfolio management services, along with performance information.

If you would like to subscribe to our free email publications, or if you have questions about our management, please [contact us](#).

Those looking for a trader, market timer or 'seer' should look elsewhere. Those looking for professional investors who base their decision on a calm and deliberative assessment of value should work with us.

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