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CUSTOMIZED MONEY MARKET &
FIXED-INCOME PORTFOLIO MANAGEMENT
FOR INSTITUTIONAL CLIENTS

INDEPENDENT

Moreton Asset Management, LLC is an employee owned firm. Our firm does not carry inventory and is not beholden to any financial institution. Our independence allows us to be nimble in changing markets.

TRANSPARENT

Our firm strives to provide transparency throughout the entire investment process. With detailed online reports, flat-fee pricing, and regular face to face account reviews, we provide our clients with the necessary tools and expertise to succeed.

EXPERIENCED

Our team of fixed-income professionals has developed a trusted relationship with our clients. These include cities, counties, school districts, special districts, corporations, credit unions, and non-profits.

PROTECT PRINCIPAL - MAINTAIN LIQUIDITY ENHANCE RETURN - PROVIDE FIDUCIARY CONTROL



Moreton Asset Management, LLC is a registered investment advisory firm. Some employees of Moreton Asset Management, LLC may also be registered representatives of Moreton Capital Markets, LLC; a broker/dealer affiliate of Moreton & Company and Moreton Asset Management. Moreton Asset Management, LLC is a separate entity from Moreton & Company. Investment Products are Not FDIC Insured, Not Guaranteed, and May Lose Value.

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