

PROSPERITY AND PEACE OF MIND

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# CALE FINANCIAL MANAGEMENT

a registered investment advisor

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## PROSPERITY AND PEACE OF MIND

Independent, fee-only investment advice and a conservative, long-term approach. Each portfolio is designed using the insight of value investors like Warren Buffet, David Swensen and Jeremy Siegel—three of the most



## TRUST AND TRANSPARENCY

CFM is independent of any bank, insurance company, or securities broker dealer; we work solely for you. We receive no securities product commissions or other corporate incentives that might otherwise influence



## SIMPLICITY AND SECURITY

Sometimes simplest is best: CFM is a refuge in an increasingly volatile global securities marketplace. We only buy high quality securities that operate with extremely low underlying costs. On average, we

successful investors in the  
world.

investment  
recommendations. Your  
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hold less than 20  
positions in each account  
while still providing you  
the security of a well-  
diversified portfolio.

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