

Investment  
Advisory  
Services

Family  
Office

Financial  
Planning

Alternative  
Investments

Retirement  
Planning  
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Cemetery  
Trust  
Investing

## About Indie Asset Partners

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## From The Blog

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Indie Asset Partners offers investment advisory services for high net worth individuals, groups, and institutions. Each engagement begins with gaining a firm understanding of clients' needs, goals, and risk tolerance. We then manage their assets to reflect those characteristics. We advise a number of clients whose main

goals are wealth preservation and steady income, while others prefer the perceived risk of greater returns. Our primary philosophy is managing your money as if it were our own.

At Indie Asset Partners, our investment disciplines and strategies are our own, based on a set of criteria formulated over 20 years of managing clients' wealth. We focus on reducing exposure to market volatility through diversification and the use of technical and macroeconomic analysis. Our disciplined asset management approach often allows us to see market trends and to take advantage of them. We find value across a variety of asset classes like common and preferred equities, bonds, currencies, commodities, and alternative funds, creating individualized, balanced portfolios that support the goals of our clients.

Our investment advisors have extensive experience in managing sizeable portfolios through good and bad times, bull and bear markets, and periods of high volatility. This experience has led us to create proprietary research and methodology focused on regularly balancing a mix of assets based upon market conditions. In the end, our goal is to achieve positive returns at risk levels comfortable for each of our clients.

February 5, 2019

## Consider the Alternative. I did.

January 9, 2019

## Indie As Welcom Dalzell, Wealth :

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"Our primary philosophy is managing your money as if it were our own."

### From the Blog

Consider the Alternative. I did.

Indie Asset Partners  
Welcomes Robert J. Dalzell,  
Certified Wealth Strategist®

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10585 N. Meridian Street, Suite 210  
Indianapolis, IN 46290

**Call Us: 317.428.6600**

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