



Welcome To A Smarter Way To Invest

Your Premier Institutional Investment Manager



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Our Investment Philosophy

A Smarter Way to Invest is an investment management firm working with both individual clients and financial advisors. We provide investment strategies that are managed internally by our team of portfolio managers and investment analysts as well as strategies offered by outside firms with varying areas of expertise that differ from our own.

Internally, we specialize in investment strategies focused on the Value investment philosophy pioneered by Benjamin Graham and David Dodd and popularized by

Warren Buffett and many others. This involves in-depth fundamental analysis to determine approximately what a company is worth and only buying stock in said company when it is priced at a significant discount to that value. We ignore short term fluctuations in prices that may be based on the fleeting news stories of the day, and instead focus on realizing the long-term value of the securities we hold.

Value investing is only one investment philosophy, and we aim to provide a wide array of alternatives to our clients. This is why we partner with other investment managers to provide strategies based on other approaches. These outside firms not only provide investment strategies managed by their teams, they also provide different market perspectives that we can incorporate into our own models.

Using both our own investment strategies and those of our partner firms, we are able to create dynamically managed portfolios for our clients. Each client account is tied to one of these dynamic portfolios (called Allocations) that we manage ourselves. Inside each allocation is our individual models that are analogous to the mutual funds or ETFs already in use by many investors. Each model has its own specific focus and management discipline to determine its individual holdings. To provide long-term stability, our Dynamic Allocations will move our clients' money from equity focused models into more diversified holdings consisting of cash, fixed income, commodities, or even gold when we see red flags in the economy or the stock market. In doing this, we attempt to avoid large market corrections in a bias towards principal preservation.

Investment Models

Dynamic Allocations

401(k) Offerings

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