

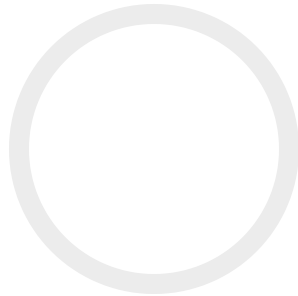
# STEERING A STEADY COURSE.

INDEPENDENT

FIDUCIARY

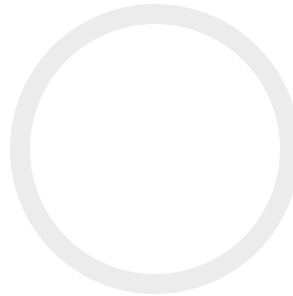
## OUR MISSION

Meet our clients' goals with the least amount of risk necessary.



### SET GOALS

Identify desired outcomes:  
retirement income,  
healthcare & legacy.



### MANAGE RISK

It's not what you make but  
what you don't lose that  
matters.

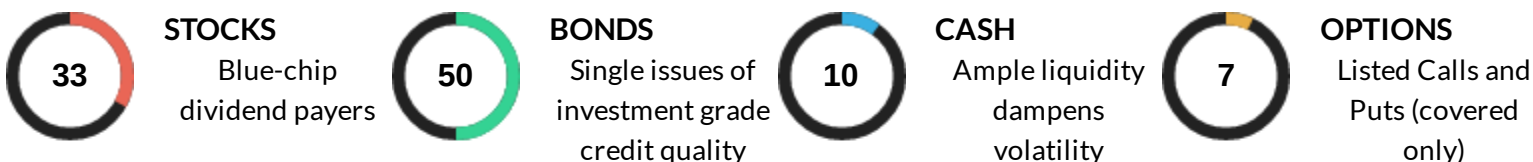
Get more information

INQUIRE

## AN INDEPENDENT FIDUCIARY

Practicing liability driven investment management.

First, we create a net worth statement to quantify current assets. Then we have our clients articulate their goals such as education funding, retirement lifestyle and a legacy plan. It is then possible to determine the dollar duration and present discounted value of these goals and compare that to the value of current assets. A customized portfolio is then crafted to set each client on a steady course to attaining their goals while taking the least amount of risk necessary. We do not use bundled or proprietary products such as open end mutual funds or structured notes, but instead "bake from scratch" using single issue stocks and bonds along with an option overlay strategy to further increase income and reduce risk. A typical client portfolio may contain an asset mix as shown, but only as a result of what needs to be achieved not as an ex ante asset allocation established by an unknown investment committee.



## What is "Weatherhelm?"

DEFINED

## LATEST NEWS

Recent Developments



### TAX UPDATE

New Federal Tax Rates for 2018 Single Filer Current Law Tax Cuts and Jobs Act

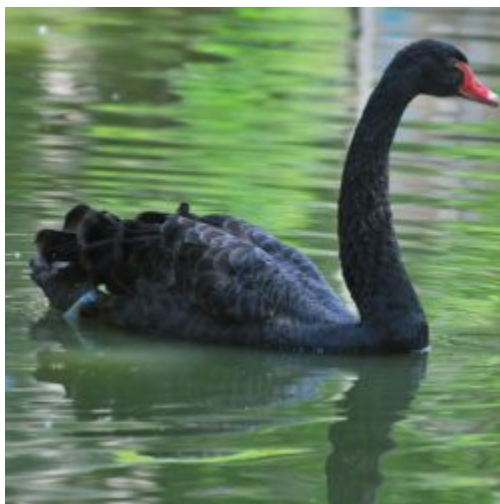
10%	\$0-\$9,525	10%	\$0-\$9,525
15%	\$9,525-\$38,700	12%	\$9,525-\$38,700
25%	\$38,700-\$93,700	22%	\$38,700-\$82,500
24%	\$93,700-\$195,450	28%	\$82,500-\$157,500
32%	\$195,450-\$424,950	33%	\$157,500-\$200,000
35%	\$424,950+	35%	\$200,000+

\$424,950-\$426,700 35% \$200,000-\$500,000 39.6%  
\$426,700+ 37% \$500,000+ Married Filing Jointly  
Current Law Tax Cuts and Jobs Act [...]



## BERNIE'S REVENGE

The view from behind the binnacle at Weatherhelm Capital Management is increasingly clouded by developments in Washington D.C. The recent failure of the Republican plan to “repeal and replace” the Affordable Care Act (a/k/a Obamacare) has for the moment, at least, been largely shrugged off by the equity markets. After opening down roughly one percent [...]



## REMEMBER THE BLACK SWAN?

The 2008 financial crisis was called a “Black Swan” event by finance professor Nassim Taleb. In his eponymous book, Taleb defined a Black Swan as an extremely difficult to predict event or occurrence that deviates far beyond what is normally expected. The term derives from the old world belief that all swans had white feathers, [...]



## BREXIT

Weatherhelm Capital Management June 29, 2016  
“Brexit” by the Numbers On June 23, the British people undertook an historic vote to leave the European Union. This political lightning bolt has sent global financial markets reeling. To put this move in context, we thought it would be useful for our clients to have a look [...]

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**in**

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