

HOW WE CAN HELP YOU

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PREVIOUS

Investment Advisors

NEXT

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INVESTMENT ADVISORS

ANTONETTI
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MANAGEMENT
REGISTERED INVESTMENT ADVISOR

Contact us today for your complimentary consultation
(239)403-0218

Antonetti Capital Management LLC

Few decisions in life are more important than choosing an investment management firm to manage your and your family's financial well-being. After all, would you leave your complex financial future in the hands of a computer program or one-size-fits-all investment strategy?

Antonetti Capital Management offers an alternative to the increasingly impersonal world of investment and financial planning. We are experienced experts and tailor your investments based on your investment objectives, time horizon and risk tolerance.

At Antonetti Capital Management, your investment & financial plan will be uniquely designed to fit your circumstances and vision. We provide comprehensive, hands-on objective guidance with attentive personal service that is difficult to find today. Every three months and whenever a need arises, we communicate clearly with clients in writing, by phone or in person from our Florida offices in Naples and St. Petersburg.

Antonetti Capital Management is an independent advisor, which means it's not tied to any particular investment product or research. This is important because this gives the firm the freedom to select the right financial investments to accomplish your goals based on what's right for you.

More specifically, Antonetti Capital Management is a Registered Investment Advisor. This is the gold standard of the industry because such advisors are closely regulated by the U.S. Securities and Exchange Commission and they're legally bound to put your best interest first. No other financial advisor is bound by such high ethical standards, not even those at brokerage firms or banks.

As a Registered Investment Advisor, Antonetti Capital Management acts as a fiduciary under the Investment Advisers Act of 1940. This means that the firm is required by law to always act in the clients' best interests and adhere to the highest standards of responsibility.

What are the benefits?

The benefits of selecting Antonetti Capital Management for your wealth-management needs include:

The firm takes your entire financial picture into account. From retirement to tax strategies, estate and succession planning we'll help you make the smart financial decisions in a holistic way.

Our experts are attentive and respond promptly and personally. As an entrepreneurial firm, Antonetti Capital Management is highly responsive and personally accountable to its clients.

Our fees are easy to understand because we charge a percentage of the assets we manage. This gives us an incentive to grow your assets and make unbiased recommendations.

Accumulating wealth brings complexity and the firm's experts are well-versed in the kinds of issues that require strategic thinking. Think of Antonetti Capital Management as financial quarterbacks, assembling players in estate planning, taxation and other disciplines that bring different strengths to your wealth-management team.

Independent custodians Charles Schwab and Fidelity Investments hold your investments, giving you an additional level of access and peace of mind. Schwab and Fidelity are two of the world's most reputable custodial firms and you have online access any time.

What is your investment management process?

The trust of a client can only be earned. That is our motivation. We operate based upon the simplest beliefs — do what's best for our clients. Our first priority is to protect our clients' capital by staying with the spectrum of acceptable risk based on the clients specified risk tolerance, investment objective and time horizon.

Antonetti Capital Management's multi-asset class investment management program is a professionally managed process. Each portfolio is built around the principles of asset allocation, risk management and diversification. Proper asset allocation results in a portfolio structure designed to meet the specific needs of each investor. Proper diversification may reduce the risk inherent in any one specific investment security or asset class.

Antonetti Capital Management follows a six-step investment-management process:

First, we establish a clear understanding of your investment objectives. To properly understand your objectives, we focus on many factors. We carefully weigh the purpose for investing, timeframe, past investment experience and any anticipated changes to your financial condition. The necessary and critical factors important in setting up your current portfolio are reviewed with you.

Once we have a thorough understanding of your position and your financial goals, we establish investment policies for your investment portfolio. These policies are the rules, guidelines, and strategies that will be used to meet your unique and specific needs. They serve as the road map from which we will measure your financial progress.

Second, we build an overall macroeconomic outlook that will drive asset selection. Many passive asset allocation programs include a large number of low-correlation investment categories in their portfolios. This is done to minimize overall portfolio volatility while providing average returns. In other words, when one investment is performing poorly, another may be performing well. While this makes sense in theory, we do not believe that all categories belong in all portfolios at any given time. For example, after significant increases in real estate and commodity prices, these asset classes may look very attractive based on historic returns. But how likely is it that the next five years will look like the last five? As a result, we may not have a specific allocation to commodities or real estate in any given time. That said, given the flexible approach we have designed in this program, we have the ability to include asset classes such as these should economic conditions change.

Third, we select and adjust the appropriate investment asset allocation. Our investment management philosophy is based on the belief that the most important determinant of a portfolio's return is not individual security selection, but rather the investment categories in the portfolio or asset allocation. Those investment categories may include large company domestic stocks, small company stocks, international stocks, Treasury securities, investment-grade corporate bonds, high-yield bonds, international bonds, money market funds and many others. Because the overall performance of a portfolio is so highly correlated to the asset classes in which it is invested, category selection and specific allocations to each of those categories is very important.

Unfortunately, most people skip this step, and look only for the latest hot tip. As a result, they may end up with a portfolio that is inappropriate for their risk tolerance or one that will not enable them to reach their return objectives. In order to keep track of hundreds of different investment categories, we are continuously involved in sector and allocation research. We research each category based on expected rates of return, the amount of risk taken in getting that return, and correlation. It is very important to use expected levels of risk and return and not simply historical results. While the past can help us understand trends and relationships, it cannot predict the future. Our goal is to find those categories that offer an attractive return relative to their risk going forward.

Fourth, we determine how much to invest in each selected asset class. Once we have determined which categories are most appropriate, we calculate how much to invest in each area. You should expect many different sectors in your portfolio. Each investor has unique goals, time horizons, and risk tolerances. Therefore, it is essential to adjust the investment allocations carefully to meet your personal investment objectives.

We use both historical and expectation analysis in determining what percentage of your money will be assigned to each sector. More conservative investors can expect to see higher bond allocations, while more aggressive portfolios would include assets like small company stocks. The key is that all accounts have a mix of asset classes to help manage volatility in varying market conditions.

Fifth, we identify and select appropriate securities for each category. In this step, we research, evaluate, and select the investment securities to be used in your account. During this very important decision-making process, we have no favorites, no biases. It is essential that we remain completely objective. As a result, we do not favor funds from any specific fund family, type of security, nor do we receive any commissions based on transactions. We evaluate consistency of past performance and correlation of a security or fund to its index or benchmark. Once a security or fund passes through our filters, we extensively review each strategy. By doing so, we create a focused portfolio of securities with fewer surprises.

Lastly, we provide ongoing investment management and quarterly review meetings. We monitor and evaluate all changes. We regularly assess investment categories, re-evaluate sector amounts and weightings, and actively rebalance or re-adjust the percentages in each category when we see windows of opportunity that we believe will enhance our clients' total investment return.

This strategy controls the risk level in your portfolio and potentially enhances overall return. Furthermore, we communicate investment performance in person and in writing by providing a total investment return in real dollar terms and a percentage. We track investment performance since inception and after one year, compare the account performance to the appropriate index benchmark. Simply put, our clients know how their assets are performing by looking at one sheet of paper with a simple phone call. With Antonetti Capital, there is no need to hunt through reports in order to find the bottom line. We provide it for you. After all, isn't that what an investment management firm is supposed to do?

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