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DISCOVER YOUR WEALTH, WELL-LIVED.™

We are caring individuals with a deep commitment to each and every client relationship.

We are a collaborative team of wealth professionals with far-reaching financial know-how.

We are a familiar name. Like the families and businesses we serve, we're no strangers to our community's many challenges ... and its endless blessings. We're here for the long haul.

We are AVL WealthCare, serving business owners, professionals, philanthropists, retirees, retirement plan providers and others in the Mississippi Gulf Coast region and beyond.

Learning Center

Understanding Different Types of Risks

Larry Swedroe on the importance of integrating all risks (not only the investment kind) into an overall financial plan. Larry Swedroe, Director of Research, The BAM ALLIANCE Harry Markowitz received the Nobel Prize in Economic Sciences in 1990 for his contributions to the body of work known as "modern portfolio theory." Probably his greatest contribution...

An Integrated Investment Plan Is Key

A sound investment plan isn't the only way to find financial security. Earlier this week, we looked at the importance of incorporating different types of risk—specifically, human capital risk—into an overall financial plan. Today I will focus on mortality and longevity risk, and using "tax alpha" strategies to improve the odds of achieving your financial goals....

A More Complex View On Value

Larry Swedroe shows that book-to-market isn't the only criteria for defining the value factor. Eugene Fama and Kenneth French's 1992 paper, "The Cross-Section of Expected Stock Returns," resulted in the development of the Fama-French

three-factor model. This model added the size and value factors to the market beta factor. As my co-author, Andrew Berkin, and...

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