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Map and Directions

Market Watch

Last Closing Prices

Dow Jones Industrials 26,806.14 - 0.43
NYSE Composite 13,147.21 - 0.48

Get Quote

[Markets | Charts | Quotes | Portfolio]

Market data delayed per exchange rules.
All quotes are in US Eastern Time (EST).

Learning Center

Articles
Educate yourself on a variety of financial topics.

Calculators
A host of financial tools to assist you.

Newsletters
Timely Newsletters to help you stay current.

Glossary
Financial terms from A to Z.

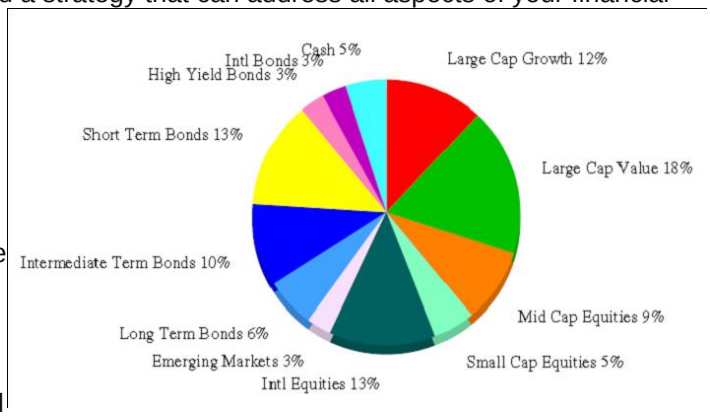
Videos
Short animations that focus on a variety of financial topics.

Flipbooks
These magazine-style flipbooks provide helpful information.

A disciplined approach, a comprehensive financial solution, and the security of a long-term relationship

At Oak Asset Management, it is our belief that wealth properly managed is wealth with a future. We specialize in providing clients with customized wealth management strategies and solutions. Our tailored services include everything from retirement planning, to developing methods for funding higher education, to creating intricate financial strategies. Working from our analysis of your current financial situation and agreed-upon investment goals, we formulate a carefully conceived plan to help you achieve your objectives. We use a disciplined consultative process to create customized, managed portfolios. We work with our clients to construct, implement and monitor an asset allocation strategy that will help the client achieve their many objectives while at the same time manage risk. Our entire process is centered on strategic asset allocation - your optimal combination of stock, bonds, cash and more specialized investments, to provide growth and income at a level of risk you feel comfortable with.

We work closely with our clients to identify their short and long-term goals and understand the nature of their existing portfolio. Our primary objective is to make your portfolio grow, be your trusted advisor and help make your financial dreams become reality. We have over 25 years of knowledge and expertise to sort through options and recommend a strategy that can address all aspects of your financial life.



Our investment strategy combines broad asset class diversification while passing on a low cost structure to our clients. We help clients achieve their financial goals through an organized framework and methodology based on academic research and the efficiency of the capital markets.

Oak Asset Management provides highly customized financial advice, investment solutions and brokerage services to individuals, families, corporations and foundations.

We are dedicated to serving our clients through a relationship based on intimacy, integrity, and mutual trust. You will find that we take a distinctly different approach to wealth management. We recognize that you face an ever increasing set of financial challenges - family life, business matters, investments, college planning, retirement, wealth transfer solutions and dozens of other complex considerations.

Rather than offering prepackaged products, you need access to quality investment solutions founded on your unique situation. We help you manage the many financial rewards and responsibilities that come with success. We will take the time to understand how your finances relate to your life and provide you with the powerful solutions for growing and preserving wealth while making every attempt to enhance your quality of life.

Calculators

Impact of Inflation
Estimate the future cost of an item based on today's prices and the rate of inflation you expect.

Mortgage Acceleration
This calculator can help you determine how soon you can pay off your mortgage.

Retirement Portfolio Lifespan
How Long Will Your Funds Last?

Required Minimum Distributions
Estimate the annual required distribution from your traditional IRA or former employer's retirement plan after you turn age 70½.

More Calculators →

Newsletters

ABLE Accounts for Disability Expenses
Explore ABLE account requirements and potential benefits, including new saving opportunities under the 2017 tax law.

New Study Finds Widespread Job Loss After 50
A job loss after age 50 can carry serious consequences. These tips may help you prepare professionally and financially for a late-career challenge.

HOT TOPIC: Keeping an Eye on Corporate Debt
This article looks at credit quality in the corporate bond market and the potential impact on fixed-income portfolios.

An Affordable Insurance Solution
A new term life insurance policy can be quite expensive as people age. Survivorship life insurance may be a more cost-effective solution.

More Newsletters →