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Wealth Management

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OUR CORE VALUES

We deliver a fiduciary standard of care to our clients which results in putting their interests ahead of all others in the investment process.

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Learning Center

Persistent Returns for Active Managers Remain Elusive

Outperforming active funds rarely manage to repeat their success. Larry Swedroe, Director of Research, The BAM Alliance Since 2002, S&P Dow Jones Indices has published its biannual S&P Indices Versus Active (SPIVA) scorecards, which compare the performance of actively managed equity funds to their appropriate index benchmarks. Its midyear reports focus on the question of...

The Perils of Owning Individual Stocks

Hope vs. wisdom and investors' failure to diversify. Larry Swedroe, Director of Research, The BAM Alliance Individual stock ownership offers both the hope of great returns (finding the next Google, for instance) and the potential for disastrous results (ending up with the next Lehman). Because investors are not compensated for taking the risk that their...

Things to Consider Before Sending Your Child Off to College

Bill Kaiser explores some financial tasks to consider before sending your child off to college. Bill Kaiser, Wealth Advisor, Bland Garvey Wealth Advisors As the high school graduation parties wind down and your child begins counting up their

gift money, now is the time to get a few things in order before they head off...

VIDEOS

CORE VALUES

An Independent Member of



THE BAM ALLIANCE

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