



Portfolio Management

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(/fiduciary-based-
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A Flexible Investment Solution Built for the Fiduciary Advisor

The wealth management industry is entering into an era of dramatic change. Three major macro themes are already redefining the landscape for wealth management.

- On the regulatory front, new fiduciary rules issued by the Department of Labor are forcing many advisors to reexamine their business models - for the better.
- From a market standpoint, all signs point to an extended period of more modest stock and bond returns, meaning a keener focus on taxes and expenses is more important than ever.
- Finally, the demographic impact of the baby boomers entering retirement is in full swing, and clients are adjusting to the psychology and fundamentals of investing in retirement rather than for retirement.

Taken together, these themes present a challenging environment for advisors, but a great opportunity, for those who get it right.

Logia Portfolio Management was formed with the intention of meeting the very market challenges advisors are facing. By combining today's best technology for managing portfolios with the human element of true portfolio expertise, Logia is equipped to deliver a fiduciary-based approach to client portfolios - focused on risk, taxes and expenses, to deliver better outcomes.

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