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quiverfinancial

what's in your quiver?

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Our Strategy

Our strategy is to invest in a risk appropriate,

diversified portfolio during time of market growth,

and apply risk management techniques to raise cash

during the times that markets are experiencing prolonged declines.

Sign up below to receive our newsletter and announcement of events.

First Name: *

Last Name: *

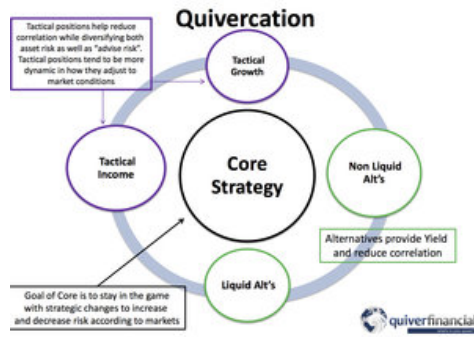
Email Address: *

Your portfolio should actively reflect your changing needs and the dynamic market conditions.

We actively manage your portfolio and adjust for the changing tides of the market by using a combination of investment types that provide tactical income, tactical growth, and various alternatives.

Through proper diversification and using alternatives* to reduce correlation with market downturns, your portfolio can continue to earn even when the markets aren't yielding.

*Not appropriate for all investors.


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Portfolio Stress Test



Are you properly diversified? Does your portfolio match your current risk tolerance?

Whether it is the change in the markets or a shift in your own investing desires, it is prudent to review your current allocations periodically, and assess how they may act under stress.

"We are committed to helping you create a long-term, profitable financial portfolio."

- Colby McFadden, Founder of Quiver Financial

How it works:

1. Find the connections

By using data to measure the various relationships between

2. Model the Impacts

In a stress test, potential investment performance is reviewed using

3. Create Plan B

The ultimate goal of a stress test is to have a plan B thought out before it is needed. This way

CLICK FOR PORTFOLIO STRESS TEST

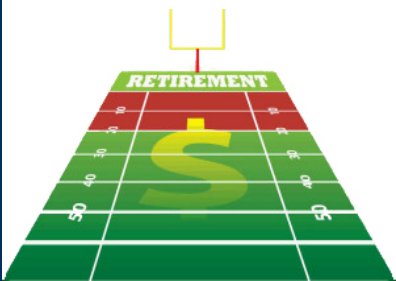
investments in your portfolio and a selected stimulus such as, “What may happen if interest rates rise?” We can help determine which portions of a portfolio may experience greater levels of stress.

the relationships measured in the first step. Remember, past performance is no guarantee of future results.

we can watch and observe market moves and begin acting on plan B if signs of stress should start to show.

TEST YOUR PORTFOLIO

If you are within 5 years of retirement, then you are in the RED ZONE!



Why does this matter?

The five years before and after retirement are considered to be the most important times for retirement planning and risk management.

These years are crucial, where small shifts in how much you save and where you invest can make all the difference.

Does your portfolio pass the stress test?



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