Investing is a balancing act: *misadjusting just one counterbalance upsets portfolio stability.*

We Are Envision Capital Management, Inc., Registered Investment Advisors Specializing In Bonds For Individual Investors Like You.

Click here to read Marilyn Cohen's Blog & Forbes Magazine columns.

Marilyn Cohen to speak twice:

- *Forbes Investors Cruise* in July 2019
- *MoneyShow San Francisco*, August 17, 2019

Who We Are

Envision Capital Management, Inc. is a privately held, boutique money management firm specializing in fixed income securities. The company manages investment portfolios for individuals, privately held companies, and tax-deferred accounts.

How We Work

Everything we do at Envision Capital enhances our clients' peace of mind and the safety of their money. That's why we believe in separating the money manager from the firm serving as custodian. We domicile each client account at Fidelity Investments, one of the industry's largest, most reputable custodians.

Value Added

Have you felt the frustration of attempting to penetrate layers of a money manager's marketing and/or administrative bureaucracy just to get your questions answered promptly and respectfully?

That won't happen at Envision Capital. Every

Let's Talk

Envision's CEO, Marilyn Cohen, is just a telephone call away. Give her a call and find out why Forbes designated Marilyn as its most highly regarded fixed income investment guru for 20 years running. If your current investment program

Envision's size is its strength: We're large enough to have a significant presence in the fixed income markets. This allows our traders to get institutional market prices or better—something our clients could not get on their own. At the same time, the company's boutique size and our focus on separately managed bond accounts allow us to give individual attention to every client.

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Fidelity serves as the prime broker designee for our client's accounts. This gives us the ability to trade with any broker/dealer in the industry with the best price. Fidelity holds our client's bonds and cash while collecting the income generated in the portfolio. Fidelity also safeguards our client's privacy with the latest tools at its disposal. We work with 50 brokerage firms throughout Wall Street, getting multiple bids or offers for each transaction. We are beholden to no one.

We treat your money with the same respect and care as we do our own. Our clients have 24/7 access to their online accounts and statements through Fidelity's client website portal. Equally important, we are happy to review your individual account's performance statistics anytime you wish and as often as you wish. At Envision Capital, we never forget that it's your money and your peace of mind you have entrusted us with. We're here to serve you.

We take a customized approach. This means we manage your money to your time horizon with separately managed accounts.
Unlike funds, you are protected from other investors moving money in and out.

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client—no matter the size of their account—is a telephone call away from Marilyn Cohen and Alex Anderson, your personal account and portfolio managers. We work for you and never forget it. Further, Marilyn and Alex genuinely want to hear from you.

Our value proposition extends to the custom fixed income account designs and management that is our niche specialty. It is a personal service the mega-managers cannot offer, no matter what their marketing hype says. But we do.
We discuss, advise, and then execute for you. With your input, we form an investment strategy that meets your requirements for safety, liquidity, and yield.

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is appropriate for you, she'll say so. If Envision Capital can add value, she'll tell you that too. Setting up an account with Envision Capital is easier than you can imagine. We'll walk you through the forms necessary to get started. Call today 800 400-0989.

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