



Investments Tailored for Your Goals

Ulland Investment Advisors (UIA) is a boutique investment advisory firm dedicated to building and securing our clients' wealth. For over +20 years, UIA has identified unique investment opportunities across both fixed income and equity markets. Today UIA offers multiple strategies to meet our clients' goals. UIA designs separately managed accounts to meet your risk tolerance and return expectations. An overview of UIA's strategies can be found [here](#). As of March 31, 2019, the firm manages over \$326 million Assets Under Management (AUM).

Our Strategies

Intelligent Fixed Income

The Intelligent Fixed Income strategy seeks to provide you with a long-term total return while striving to generate meaningful current income. For taxable accounts, Qualified Dividend Income (QDI), which is currently taxed at a more favorable rate for upper tax brackets, is favored. The Intelligent Fixed Income style is for clients seeking a 100% fixed income investment.

AUM (as of Mar. 31, 2019): \$141 Million



[View the Fact Sheet](#)

Defensive Growth

The Defensive Growth strategy seeks to provide a combination of current income and long-term capital appreciation. The strategy uses both fixed income and equity securities. For taxable accounts, qualified dividend income (QDI), which is currently taxed at a more favorable rate for upper tax brackets, is favored. The Defensive Growth style is for clients seeking both stock and fixed income exposure.

AUM (as of Mar. 31, 2019): \$157 Million



[View the Fact Sheet](#)

Intelligent Blend

The Intelligent Blend strategy seeks to provide long-term capital appreciation. The strategy invests predominately in common stocks, primarily in U.S.-based companies of all sizes. The strategy has the flexibility to invest across all sectors and market capitalizations. The Intelligent Blend strategy is for clients seeking equity exposure.

AUM (as of Mar. 31, 2019): \$19 Million



[View the Fact Sheet](#)

Our Best Idea: Big Bank Preferreds Paying 6%

Learn more about our Intelligent Fixed Income strategy, targeting a 4% to 6% net return for clients using primarily big bank preferreds.

UIA In the News



Why Now Could Be the Time to Look at Preferred Stocks
Barron's December 28, 2018

Investment Strategies

[Intelligent Fixed Income](#)

[Defensive Growth](#)

[Intelligent Blend](#)

Meet James Ulland

As Minnesota's former chief regulator of securities and banks, James Ulland understands the importance of managing risk through diversification and strategic asset allocation. UIA's



investment strategies are designed to fit every stage of life and risk tolerance level.

Overvalued Preferreds
Barron's June 26, 2018



The Right Preferreds
Barron's February 17, 2018



Nice Analogy for Potential
Problem With Passive ETFs
Barron's October 9, 2017



Preferred Shares: High-Yielding
but Pricey
Barron's August 19, 2017



Is PFF Getting Too Big for the
Preferred Market?
Barron's March 24, 2017

Upcoming Conferences

Past Conferences

June 24-25
Linkbridge Global Investors
Annual Meeting
New York, New York

April 2, 2019
MarketsGroup Private Wealth
Forum
Minneapolis, Minnesota

April 1, 2019
Opal Exchange
West Palm Beach, Florida

Meet Nat Beebe [in](#)

Nat Beebe is the lead portfolio manager on Ulland Investment Advisor's Intelligent Fixed Income (IFI) strategy. He has managed the strategy since inception in 2017. He is routinely featured in Barron's for his view on fixed income, specifically on the preferred stock space.

