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Learning Center

The Toll of New Trade Tensions and Your Portfolio

June 3rd, 2019

It was hard to miss the headlines about escalating trade tensions between the U.S. and China this week—and hard not to notice the up-and-down market activity that went along with it. But what, if any, long-term impact does trade policy have on the economy and, by extension, our portfolios? The BAM ALLIANCE'S Director of Investment...

The Uncommon Average

May 7th, 2019

May 2019 “I have found that the importance of having an investment philosophy—one that is robust and that you can stick with— cannot be overstated.” — David Booth The US stock market has delivered an average annual return of around 10% since 1926.[1] But short-term results may vary, and in any given period stock returns...

Evidence Based Investing Captures what Traditional Indexing Leaves Behind

April 23rd, 2019

Prior to joining Buckingham Strategic Wealth, I worked with institutional clients educating them and supporting their use of indexes within their global equity portfolios. At the time, I was working with MSCI - the index giant - out of their Chicago and San Francisco offices. My clients included some of the largest public pensions in...



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