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WHO WE ARE

Investment Insight Long Island Investment Advisors

Investment Insight Wealth Management, LLC is a Registered Investment Advisor serving businesses, retirement plans and high net worth investors since 2004. Located in Massapequa, New York. As Long Island Investment Advisors, we are proud of our twenty-five years of investment experience.

We have no affiliations with brokerage firms, insurance companies, banks, or mutual fund companies. We do not collect commissions. We work strictly for our clients. What that means to our clients is real investment advice, free from all conflicts that exist when your advisor is working the financial firm instead of you.

Our client's assets are invested through one of the nation's largest discount brokers, where we invest in mutual funds with no sales charges. Our clients pay very low rates to the discount broker for stock and bond trades. Lower fees mean higher returns for our clients' portfolios.

We provide a variety of services under the scope of investment management and financial planning, including portfolio analysis and management, developing a financial plan, retirement planning, investment tax strategies, estate tax planning, educational planning, and funding.

What distinguishes our firm from others is that we have a fiduciary responsibility to provide investment and financial advice that is in our client's best interest. Competitors, working for brokerages, banks, and insurance companies, just need to provide their clients with suitable investments, whether it is in their best interest or not. The major difference is that we work for our clients in this fiduciary capacity, never subject to the conflicts of interest of selling company products to our clients.

We also serve as pension plan fiduciaries. We provide services to plan trustees including; 401(k), 403(b) or 457 plan fee disclosure analysis. A formal plan review process complete with employee disclosure and waiver notices, as well as, continuing education and enrollment meetings for your company's 401(k), 457 or 403(b) retirement plan participants.

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THE INVESTMENT PROCESS

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Our recommendations are based on a painstaking analysis of our client's current financial position, their investment objectives and tolerance for market risk. This is accomplished through a very thorough fact finding session with the client, in which we guide the client through the details of their current financial situation.

One of our goals is to carefully explain ways that our clients can increase their wealth by implementing a variety of strategies including the reallocation of assets, reducing investment expenses, and implementing a sound tax strategy to reduce the amount of income tax being paid.

Other financial strategies in place to deal with issues like estate taxes and risk management plans are evaluated as well.

Long Island Investment Advisors can:

- Reduce your investment expenses
 - Increase your income
 - Save more money
 - Understand the risk in your portfolio
 - Lower your income taxes
 - Avoid making mistakes that cost you money
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Let us Build and Protect Your Wealth, Today!

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FIDUCIARY RESPONSIBILITY TO OUR CLIENTS

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Investment Insight Wealth Management, LLC is a Registered Investment Adviser, and as such, always maintains a fiduciary standard with investing client funds. Maintaining a fiduciary role means that when evaluating and recommending investment strategies, we must take several important factors into account. Risk tolerance, a time frame to invest, investment experience, and investment expenses to name a few, make appropriate recommendations that are always in the best interest of our clients.

Are you aware that Registered Investment Adviser firms maintain a fiduciary role and are held to a higher standard of behavior concerning investing client funds than many competing financial companies that you may invest with? Brokerage firms, insurance companies, mutual fund companies and banks work within the suitability standard, which means that an investment necessarily doesn't have to be the best product to fit your circumstances just appropriate. In other words, there can be high sales charges, higher than average management expenses, fees that are unnecessary and hidden, as well as products sold that, may help clients meet a particular goal, just in ways that are not expeditious.

Examples of the suitability standard might be an insurance company that sells you a whole life policy as the primary way of funding your child's education. A brokerage firm that sells a client a mutual fund with high sales charges and management fee, or a bank that allows its customers to invest in a passbook account when they can invest in a money market in the same bank that pays more interest, is liquid and has the same FDIC insurance.

You get the picture. The suitability standard can put the broker, agent or financial firms financial interest ahead of the clients; whereas as firms working within the fiduciary standard must always put the client's financial needs first.

Our firm maintains its fiduciary role in several ways.

- We are an independent firm, which eliminates many of the conflicts of interest that are so prevalent in the financial services industry today.
- We don't have to offer any company's products.

- > We can simply make investments based solely on the merits of the investment itself.
- > We custody our client accounts at one of the country's largest discount brokerage firms.
- > We do not accept a commission for placing our client's money in investment products.
- > We are fee-based, work on our client's behalf, and are paid by our clients for our services.
- > We maintain a policy of full disclosure of our fees and services and maintain written policies of such for client review.

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Our clients permit us discretionary power to manage their portfolio. We are working for our clients, so we are looking for the best possible investments for our clients to be satisfied with our working relationship. This strategy serves our clients well, as we can swiftly address investment decisions on both the buy and sell sides of trades and get execution at current market prices. Our experience has taught us that clients are not so much interested in the details of why we are buying or selling particular securities, only that it is the best advice we have for them in their current financial situation.

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We do not invest in investments merely for the sake of owning a particular asset class. Instead, we assess the opportunity at hand and make decisions based on the current economic outlook and daily economic, as well as, corporate news.

We are typically long-term investors, meaning that we are willing to own an investment long enough until it is reflected in the share price. Typical holds for stock positions may be three years or longer. Longer term holds for more than three years are not uncommon.

No one is right 100% of the time when it comes to investing. We are no exception. We do invest in profitable and stable businesses to give our clients' portfolios the best chance for success. It also helps us to sleep a little better at night.

BUILDING AND PROTECTING WEALTH

When it comes to investing for wealth accumulation or the protection of wealth it is important to understand the risks and plan accordingly.

Wealth accumulation can only be accomplished through regular and systematic investments of capital that can consistently compound at an average rate that is greater than the average rate of inflation plus taxes due. Anything less can result in capital accumulation, but the will be a regular loss in purchasing power.

Other than making investments, the same principles of wealth accumulation can be applied to wealth protection. The key to wealth protection is understanding the rate of return you need to achieve to support your lifestyle needs when accounting for the loss of purchasing power and taxes. Understanding what your money must do allows you to invest without taking undue risk to your capital.

Of course in either scenario, it's necessary to monitor changes in inflation, taxes and investment performance on a regular basis.

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