We are Advisor.Investments and below we will share our vision for building an investment firm for the digital age. Before we begin, a little history.

We own an Investment Advisory Business, which focuses on retirement related issues for individual employees. Years ago, without much thought, we named our business Diversified Investment Strategies, LLC. Shortly after with even less thought apparently; we selected a domain for a website because that's what everyone said you had to do. After searching and finding that all the domains we wanted were taken, we decided on **disria.com (http://disria.com/)**. No it isn't some disease, it stands for DIS (Diversified Investment Strategies) and RIA (Registered Investment Advisor).

Back to the grind… One of our investment strategies is to locate investment situations where we think the market has underpriced the assets of a business. We also look for some event which will bring liquidation in order to unlock that value. We became aware of spinoff in the internet/domain space. Upon digging more, we discovered that the internet was set to EXPAND. Great news for us to possibly upgrade our domain name we thought. The vision began to grow as we researched more. It was a serious learning curve, but fun along the way.

So a little more about our business is needed before sharing the vision. We believe that investment advice is going through a fundamental shift in delivery methods. At our core we believe in customizing portfolio's for our clients be blending value based investment strategies. We believe the overall experience is much better when we add great client service with proper tax planning and preparation.

With the great talent we have in place we believe we can blend the importance of client service, and advisory relationships with our investment philosophy across the new digital platforms, into one outstanding firm to handle the needs of our clients.

In order to provide you with a better insight into our firm, we break it into the 3P's.

PEOPLE – WHO ARE WE?

- 7 Full-Time employees working for you
- Serving clients across Texas, Louisiana, Mississippi, Alabama and Florida panhandle.
- Enrolled Agent on Staff for expert tax services
- CFA Charter Holder conducting investment research
- 4 Investment Advisor Representatives
- Separate organization functions for Service, Advice, and Investment Management, blending together for you.

FOR MORE CLICK HERE (HTTP://WWW.ADVISOR.INVESTMENTS/#BLOCK-NODEBLOCK-135222)

PHILOSOPHY – HOW DO WE MANAGE MONEY?

- **All Investments have risk** – We try to find where a particular risk has been over-priced by the markets.
- **Search for Investment Value** – We believe market price does not always reflect the true value of a business.
- **Personalized Portfolio Management** – No two portfolios will be exactly alike.
- **Contrarian Mindset** – We prefer to look for unloved, under-appreciated investments, which are likely to be contrary to popular opinion.
- **Analysis over Prediction** – We use fundamental value-based approach instead of trying to predict markets.
- **Diversification of Risk Factors** – Our investment categories include Timed Event, Non-Specific Timed Event, Long-Term Value Extraction, Contrarian asset class

New Meaning to Diversification – While diversification, as it's been preached and practiced for years, can be helpful, we have found that in time of stress, many correlations go to one, which ironically is when you need diversification the most. So we choose to look at investments in terms of strategy, risks, and time frame.

- **Timed Event** – Known future event is likely to provide liquidity
  - Merger Arbitrage
  - Deep Covered Call Writing
- **Non-Specific Timed Event** – Liquidation of some type is expected, yet timing is currently unknown
  - Closed-End Funds at wide discounts to NAV
  - Preferred Stocks
  - Cash Cows
  - Companies below Net Working Capital
- **Long-Term Value Extraction** – Open ended investment horizon, looking for value in companies that are:
  - Generally out of favor and we believe company has competitive advantage
  - Specifically out of favor with healthy balance sheet, high historical profitability, and in need of some type of transition

- **Contrarian Asset Allocation** – Internal asset class model based on identifying out-of-favor asset classes over 5 years time horizon

FOR MORE CLICK HERE (HTTP://WWW.ADVISOR.INVESTMENTS/INVESTMENTS)

PROCESS – WHAT CAN YOU EXPECT AS A CLIENT?

- Initial Client Meeting
- Research
- Portfolio Construction
- Internal Monitoring
- Client comprehensive review (including tax)
- Mass Communications

Portfolios are constructed independently from all other client portfolios. While this can be more difficult and less efficient than the “cookie cutter” approach taken by pooled money such as mutual funds, we believe what was value one, two, three plus years ago, is not necessarily value for you today. We tend to be patient when choosing investments, instead of rushing to meet target allocations.

Portfolio Management Characteristics:

- Manage in accordance to Target Allocation selected by Client
- Construct portfolios around liquidity needs
- Initial position size tend to be 3-5% of account value
- Independent Investment Research
- No Style/Asset Class Constraints
- Diverse Risk Drivers
- Subject to personal client restrictions

- Rebalance when appropriate

FOR MORE CLICK HERE (HTTP://WWW.ADVISOR.INVESTMENTS/WEALTH-MANAGEMENT-SERVICES)

Now back to the vision. One of the new domain extensions was .Investments. We pre ordered without knowing whether we would be able to register several around our name. Then our mind began racing. We thought, well we travel to Midland, Houston, Lafayette, McComb, Mobile and Pensacola, so we might as well try to get those domains and possibly other major cities as well. We also applied for keywords in the investment industry, such as 401k.Investments and Advisor.Investments

After learning we “won” quite a few of these domains, we asked now what?

Our vision is to partner with other firms and advisors to build a network became clear. For example, an advisor located in Houston would be able to rely on a 401k provider when needed. They could also advertise that they have service in Houston.

Therefore we seek to partner with ethical knowledge workers in order to build an advisory network across investment services, delivered in person in a variety of locations, and through communicate over the digital network.

By seeking to professionally serve our client’s needs, we hope to expand our geographical reach and knowledge.

At this point we believe we have some great domains, a lot of experience and a great back office in the wealth management industry. We are looking to partner with others on building the business. Below are a few sample categories (not all domains listed).

Developed Projects:

Advisor.Investments

QlacInvestment.com

Forwarding domains:

Lafayette.Investments (our second permanent meeting location)

BatonRouge.Investments

Houston.Investments

General Investment Domains:

Term.Insure

Annuity. Investments

401K.Investments

403B.Investments

Pension.Investments

Annuity.News

Qlac.Guide

QlacGuide.com

Advice.Financial

Dividend.Investments

Robo.Investments

Planner.Financial

Geographic Investment Domains:

Atlanta.Investments

SanFransisco.Investments

NewOrleans.Investments

Please Email **service@advisor.investments (mailto:service@advisor.investments)** if you would like to work with us.