

BENEFITS OF AN INVESTMENT POLICY STATEMENT

An Investment Policy Statement (IPS) should be the single most important financial document you possess. Quite simply, it is the map to your financial future. An IPS explains in detail your financial goals, risk tolerance, time horizon, and target asset allocation. An IPS serves as the foundation of all future decisions pertaining to your investments.



While an IPS may take different forms, its purpose is well-defined: to protect you from emotional responses to short-term market volatility and to ensure that a long-term outlook is maintained, despite inevitable temporary setback. The IPS should also establish rebalancing procedures to allow for asset allocation adjustments in times of extreme volatility.

Your IPS is a critical component of your relationship with us. The IPS outlines both you and your advisor's responsibilities and specifically addresses issues such as performance monitoring of the overall portfolio - as well as of the individual managers - tax efficiency, and communication procedures.

Like any good plan, your IPS should be flexible, allowing for adjustments in response to the unexpected. We will interpret economic indicators to ensure that your IPS is drafted and revised to maximize the probability of reaching your long-term goals.

The key to a smart investment strategy is leveraging what we know from research and experience to create a dynamic portfolio to support your plan.



Plan Well. Invest Well. Live Well.™

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