

5 Tenets of Investing

1 Leverage Diversification to Reduce Risk

Market conditions can change quickly and unpredictably. This is why you need an investment portfolio that's prepared for all outcomes. While diversification can never completely eliminate the impact of a bear market, it has proven to reduce the drastic impact that any individual investment can have on your portfolio.

2 Seek Lower Volatility to Enhance Returns

Lower volatility strengthens the predictability of investment returns. A more reliable return allows WPWealth team to provide a more strategic and thoughtful investment experience.

3 Enhance Returns and Reduce Risk through Global Allocation

Investors can benefit from consistent exposure in their portfolios to both US and non-US opportunities. Holding a domestic bias concentrates risk, limiting portfolio returns and the benefits of diversification.

4 Employ Asset Class Investing

Equities, Fixed Income, and Alternatives each play a specific role in your portfolio. Throughout the different stages of your life, we will work with you to determine an appropriate asset allocation.

5 Design Efficient Portfolios

In a time of instantly accessible data, the prices of market securities are driven to reflect all available information. Modern research indicates that professional money managers have not been able to consistently or cost-effectively exploit any anomalous pricing errors that do occur. With this in mind, we design your portfolio to capture the benefits of the entire market using diverse and low cost funds.

When you work with a WPWealth advisor, you will understand and appreciate that having a knowledgeable, experienced team on your side will allow you to more successfully navigate the rocky landscape of investing. We take pride in being proactive to our clients' needs, as well as anticipating changes in the financial markets before they take place.