

Investing Explained: A Guide for New Investors

The mix of strategy, market capitalization, and investment vehicle(s) we employ is wholly dependent on you, our client. Key considerations include time horizon, comfort with risk, and overall goals.

Asset Class

We employ a strategic mix of asset classes, a group of financial instruments that have similar characteristics and tend to behave similarly in the marketplace. We invest across **U.S. and International Equities** (stocks), **Alternatives** like real estate, and **Fixed Income** (bonds) for balanced performance.

HOW WE INVEST: DIVERSIFICATION & RISK MANAGEMENT

Investment Style

There are two primary investment styles, "growth" and "value." **Growth** is akin to finding the next Apple Inc. and **Value** is finding a stock that is "on sale" or trading for less than its intrinsic value. We employ both to further diversify client portfolios.



Investment Vehicles

Mutual Funds and **Exchange-Traded Funds (ETFs)** are the two main investment vehicles used for investing. These are pooled investments meaning, instead of owning individual stocks or bonds, you own a portion of the basket of companies in the Fund. These investment vehicles are another way we achieve diversification in client portfolios.

Market Capitalization

Small-Cap, Mid-Cap, and Large-Cap: undoubtedly terms you've heard merely mean small company, medium company, and large company. Each carries different levels of risk versus reward, from U.S. small-cap growth to international mid-cap value.



Diversification does not assure a profit or protect against loss and cannot guarantee that any objective or goal be achieved.



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